

CFT SYSTEM

HOW TO QUALIFY

AGENT NAME

START DATE

TARGET DATE

TASKS DONE

YOUR CHECKLIST

Tap each box as you finish it, and log the date you completed it.

1	☐	Earn your promotion (Associate)*	DATE COMPLETED
2	☐	Get licensed*	DATE COMPLETED
3	☐	Complete a minimum of 10 second-appointment Ambassador meetings	DATE COMPLETED
4	☐	Know how to conduct a 2nd Ambassador meeting	DATE COMPLETED
5	☐	Know how to run Term, IUL, and Annuity illustrations	DATE COMPLETED
6	☐	Be current & in good standing with license status	DATE COMPLETED
7	☐	Attend Tuesday and Saturday training weekly	DATE COMPLETED
8	☐	Must earn \$5,000 commission in a rolling 12 months	DATE COMPLETED
9	☐	Minimum of 15,000 net points in a rolling 12 months	DATE COMPLETED

* Required before any other item can be counted toward CFT qualification.

Agent signature

Trainer sign-off

Date qualified

OWNERSHIP STARTS HERE