

CAREER LAUNCH

CO-OP PROGRAM

Our mission is to change the landscape of America, one career at a time, by empowering people with facts to make Responsible business decisions.



The
**Responsible
Network**©

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A MESSAGE FROM THE RESPONSIBLE BRAND®

Sample text for a letter from the corporate office to the student registering with the Co-Op program is going to go here. This is simply a placeholder until the letter is written in order to see how the layout works, operates and more. Sample text for a letter from the corporate office to the student registering with the Co-Op program is going to go here. This is simply a placeholder until the letter is written in order to see how the layout works, operates and more.

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Sincerely,



The
**Responsible
Brand®**

PROGRAM OVERVIEW

Our Co-Op program is the opportunity to impact the landscape of America not only with our strategies but with a new generation of young advisor set-up to learn retail financial services in an experiential and mentored environment that creates tangible career building blocks.

The program is designed to identify and support graduates/graduating students as they enter the workforce ultimately seeking to help build a financial services business, place them in a junior position to an established financial services practice, or build tactical skills that are extremely valuable to the support employment of the financial services industry.

As Financial Education Programming we are sensitive to the professional development of the industry, and we are deeply informed by the macro and micro concerns that the financial services companies are facing. For us, it begins by identifying participants that embrace the mission of helping others. This extends to building programs that are designed appropriately for the end-user and taken to the logical point of supporting the advisors ongoing work in building a successful and profitable client base.

Our opportunity is different than traditional financial services companies. The Responsible Brand has built impactful tools that allow a young advisor to work in a peer environment as they build their financial industry competence. Why is this important? We looked at the industry's failings in establishing young careers over the last 20 years and asked: what 65-year-old wants to move their money to an advisor that just got licensed? Similarly, what 25-year-old wants to hear a 59-year-old advisor drone on about products that are not really designed to help young consumers build their financial foundation? And isn't this the consumer dynamic that got this country into the \$1.8 trillion student loan problem? The markets and consumers are often incongruent. Skills, product design, as well as the communication and financial education necessary to create solutions are not in alignment for a young advisor to establish profitable client relationships with leaning on financially well-established clientele. Sadly, most products at financial services companies do not have appropriate compensation to support building peer relationships as you establish your professional skills. And calling on your parents' friends to create opportunity has created a 90% first year failure rate on new advisors in the industry.

Our program is designed to be much more like an apprenticeship. It's also reflective of the old financial services training ground of 30-40 years ago when companies raised groups of young advisors with robust training and marketing systems.



CONTINUED



PROGRAM OVERVIEW

The Responsible Brand has done this in a modern ecosystem; technology, messaging, multi-model communications, and client solutions for modern financial concerns like: The College Debt Elimination Program, Lifestyle Foundations, The Affordable College Plan, Pre-Retirement Preparation, and Retirement Distribution Planning. As phases of life have augmented to reflect longevity and the new challenges to launching and securing one's financial stability, The Responsible Brand has mirrored those new financial challenges and kept pace with contemporary concerns and lifecycles with modern solutions.

Our advisor training and tools reflect this development. How are modern conversations had when old facts are the governor to peoples' perspectives? It's about educating and assisting clients in a discovery process. The Responsible Brands' advisor training creates the confidence and provides the resources to help clients "ask better questions." In a world of external cognition (the ability to immediately look for answers through a device); it's easy to get a facts; it's becoming even harder to know "if the right question is being asked". So, training is not just about the mental jujitsu to understand approach, counter, defense, and attack - but more importantly, when where and why. Too often the financial services industry produces monolithic solutions, bludgeoning consumers with fear; not the facts to create informed decisions about what it means to "Them". And compliance is often industry focused. We have licensing, industry certifications, and product integration built into our Co-Op Program. But that is our compliance, and while our training will not ignore the industry, what's really important to guiding advisors (equally, if not with greater emphasis) should be about being compliant to the clients' goals. That's Responsibility.

Finally, we model professionalism, industry experience, meetings, and systems that produce efficient retail financial services business. Building industry skills, duties and experience isn't and on-line tutorial or a hope that a young advisor grows through osmosis; rather, intentional activities designed to explain, demonstrate, and practice philosophy and habits - To truly anchor career opportunities through a foundational experience that will yield a profitable and fulfilling relationships.

All this needs to be accomplished in a culture that encourages, supports, and redefines the marketing approach that the industry takes. This culture nurtures learning, both from an Advisor as well as with and from our client perspectives. This speaks to one of our core values - Continuous Learning!

INTERVIEW PROCESS

We begin with a formal process of One-on-One interviews introducing the culture, community, and the resources that The Responsible Brand provides. We are looking to assess the "Get-it, Want-it, Competence to achieve it" factors. From this point we proceed to a group interview to age personality, seek to understand if a prospective co-op participant understands the market, and learn about the applicant's vision for their participation and career prospects. Finally, we conclude with a short assignment to assess an applicants understanding of the marketplace and the opportunity.



STRUCTURED APPROACH TO LEARNING

Mentor Process

No matter where one is in their career or desired career, it can't be overstated how essential it is to have a real-life mentor to guide us at each milestone. The chances of success are exponentially higher when one can be guided to the correct next step, and more importantly, how to avoid mistakes and traps others often succumb to. The financial services industry has tried to automate processes to grow your business, but some things just need old-fashioned hands-on experience to ensure survival, let alone success. New advisors in the financial services industry are facing an attrition rate of 90% largely due to the "sink or swim approach" "most experience. The Responsible Brand© recognizes the critical nature of ongoing and regular guidance of a mentor who is incentivized to advance your personal and business progress and to back stop the goals you want to attain.

Office Hours

Weekly Office Hours are a way of building a collegial environment and keeping a team in-touch with each other, sharing learnings of diverse client solutions and creating experiential depth of professional training. The goal of the weekly meeting is to encourage professional development by exchanging different experiences with client interactions around marketing, industry knowledge, sales skills, or organizational and systematic tools. This group conversation is meant to be guided around a theme or emphasis but flexible enough to challenge the participants to share their experiences with prospects and clients that they had during the week. The idea is to create a structured but open forum meant to solicit advice/observations from peers (with a mentor guiding the process). The group is also a smaller ecosystem designed to build a peer support network, find encouragement and shared learnings, and personal accountability. As such groups are typically 20 members.



Sales Education

Next to death and public speaking, selling probably instills the most fear and self-doubt in people. What most people fail to realize is that all careers require some degree of salesmanship whether we recognize it or not. FEAR is False Events Appearing Real. The Responsible Brand© has created a tested and proven to work sales system that is repeatable and duplicatable. It's a granular step by step process that gives our team the confidence to enjoy helping others without FEAR. There is no fluff in how you will learn to carry a conversation and tell a story. An access to a plethora of sales learning tools are available to you, so you can learn in the way that match your style...bite size training assets like podcasts, round tables discussions, videos, tutorials, PDF support documents and more. If you have challenges that require more attention, your mentor will step in to help. Our process is to have pre-educated prospects that want a problem solved, asking you to provide a lasting solution. It's a refreshing change from arm-twisting or manipulating others. This approach ensures that your clients will want to freely work with you and have a long-term relationship with you.

STRUCTURED APPROACH TO LEARNING

Technology & Personal Branding

Utilizing easy-to-use technology and appropriate training will help to expedite your business operations. It will give Co-Op Participants the ability to focus on the relationship with a client and not treat it as a simple transaction. The Responsible Brand© knows the necessity of you having your own personal brand as well. A personal brand crisply defines who you are, what you do, and why you do it in an authentic, honest, and genuine style. It communicates your value and what defines the expertise you can offer others. Your personal brand defines your unique voice and tells your story. Humans relate to stories and your story has to communicate how you stand out, that you are different and focused. Your brand is consistent and targets a key demographic in a defined niche. Your personal brand is inseparable from your personal life. It is your reputation. What impact are you leaving on others; how are you giving back and showing thoughtful leadership? Through this Co-Op Program, you will learn how to build your personal brand, engage people in an authentic fashion and how to stay true to the brand you promote.



Voice of the Student (VOTS)

The Voice of the Student (VOTS) program provides Co-Op participants with an opportunity to take the pulse of fellow students on or off campus regarding solving the socially responsible problem of student debt and building financial foundations. By engaging students in 30-second video shorts, you will have the opportunity to ask poignant and engaging questions that elicit an emotional response. This has value in many aspects such as having the emotional intelligence to tell an engaging story, social media marketing, shaping your approach to prospects, branding you as the trusted expert, opening doors to growing your business, personal branding content and having gravitas in the eyes of others.

Incentive Trip(s)

The Responsible Brand© is holding a Producer Challenge! Our top performing Co-Op participants from across the country will be competing. The Top 5 producers (those who have closed the most cases) will be invited to National Life Group's National Headquarters in Vermont for a special tour and learning experience.

Product carriers that we use also have their own producer challenge. Each one's qualifications are different, as are the destinations. These are excellent opportunities to meet industry specialists from different groups around the country.

OFFICE HOURS

Weekly Office Hours are a way of building a collegial environment and keeping a team in-touch with each other, sharing learnings of diverse client solutions and creating experiential depth of professional training. The goal of the weekly meeting is to encourage professional development by exchanging different experiences with client interactions around marketing, industry knowledge, sales skills, or organizational and systematic tools. This group conversation is meant to be guided around a theme or emphasis but flexible enough to challenge the participants to share their experiences with prospects and clients that they had during the week. The idea is to create a structured but open forum meant to solicit advice/observations from peers (with a mentor guiding the process). The group is also a smaller ecosystem designed to build a peer support network, find encouragement and shared learnings, and personal accountability. As such groups are typically 20 members.

TEAMS MEETING

- Group Chat Assignment – Required
- Video ON - Required

3 Minutes *Introduction & Theme or Emphasis*

Outside of a basic salutation this time is meant to preface the later discussion with a Theme or Emphasis. (Ex: The topic is “Marketing”)

- The “marketing skill” that will be addressed during the meeting.
- Tee-up participants that shared a marketing story that you will want them to engage with.

10 Minutes *Business Mention*

Business Mentions are a way of sharing successes or challenges that an Advisor faces. This is meant to be 30 seconds of individual comments per person including a short hello along with a comment on their “business best” or a challenge that they want to share with the group.

17 Minutes *Emphasis Training*

This is designed to be used as skill enhancement during experiential discussions. This is a peer driven space to discuss real application. The conversations will be organized around four recurring themes:

- Marketing
- Financial Services Industry
- Sales Skills
- Organization & Systems

The Responsible Brand provides the group leaders structure around the theme or emphasis by sending videos, case studies, product information as well as simple readings or role-play assignments that can form the interactive basis for the weekly session.

20 Minutes *Discussion*

This is a structured conversation utilizing the comments provided by the participants in the text chain. The group leader role is to integrate the emphasis training

5 Minutes *Conclusion*





**Your 15 Week Co-Op
Program is up next!**





1

CO-OP PROGRAM: WEEK ONE

OVERVIEW

Week one is meant to be an introduction to the culture, marketing, solutions, and industry resources. The following 14 weeks will include expectation of self-study and active participation leading to a functional understanding of The Responsible Brands proprietary systems, academic industry knowledge, valuable group interaction turbo-charged with experiential learning of financial services.

GOALS

Set expectations for the responsibilities, activities, and foundational relationships.

Explore Company's resources and tools to create a productive environment.

Begin process to be able to write revenue as a licensed agent.

Construct a learning environment that exposes you to the real world of financial services while mentoring the building blocks to choose a career path in this industry. You'll have a much better idea in 15 weeks! , activities, and foundational relationships.

READING/VIDEO

Fact Finder
Round
Table
Discussion
(Video)

Self-
Study for
Licensing
Exam
(Both)

One Agent
Podcast
Episode & One
Client Podcast
Episode
(Audio)



1

CO-OP PROGRAM: WEEK ONE



MENTORSHIP

1. Self-Study For State Life Insurance Exam
2. Review Marketing Approach Materials, Fact Finding Videos, Company Social Media
3. Record Fact Finder Roleplay And Send To Mentor
4. Mentor Call: Get To Know Each Other & Share Expectations

INDUSTRY BUILDING BLOCKS

1. Office Hours – Individual Introductions to the Group: 30 second introduction as well as Personal Best & Business Best
2. Register for: Life Exam self-study materials and pre-tests & Certified College Debt Specialist and/or Certified Debt Specialist
3. Exploration of the product portfolio
4. Introduction to solutions design process

LEARNING OBJECTIVES

Gain a topographical understanding of the systems and resources. Start mapping out a schedule to plan your success.

Acquire assignments and benchmarks for successful completion of the program. Introduction to culture and industry basics.





CO-OP PROGRAM: WEEK ONE



TECHNOLOGY & BRANDING TRAINING

Connect with all university groups available to you on social media platforms.

- LinkedIn
- TikTok
- Instagram/Facebook
- etc.

VALIDATION | PRODUCTION | REVENUE

Voice of the Student (VOTS) Assignment: Submit 5 30-Second videos of student or recent graduates talking about the following topics:

- What has your education taught you about personal finance?
- What is the #1 financial concern for you today?
- How do student loans impact your future decisions? Do you have concerns?

Finally, begin studying for your licensing exam!

PROJECTED OUTCOMES

Week one of any development program involves laying the groundwork for productivity. Your experience will be different. We will empower you with information, resources, and tools to bring responsible financial solutions to the market. This is a combination of communication skills, efficiently leveraging resources and putting a coaching system in place to create an environment of professional learning.

NOTES:



CO-OP PROGRAM: WEEK ONE



MY LEARNINGS FOR THIS WEEK: *TOP 5*

- 1
- 2
- 3
- 4
- 5

MY TOP CHALLENGES THIS WEEK:

Onto Week 2 →

2

CO-OP PROGRAM: WEEK TWO



OVERVIEW

Week 2 should consist of continued self-study for the Insurance exam; targeting a mastery exam by the weekend. We will also explore elevator pitch presentations, client approach materials, and what components are necessary to effectively market financial services.

GOALS

Get comfortable with client approach; utilizing marketing outreach systems.

How to initiate and carry introduction conversations with potential end-users.

Explore debt and CDEP program solutions.

Understanding the general topography of financial services, products, strategies, and markets.

READING/VIDEO

Review all end-user outreach material (Reading)

Read The BASICS of College Loans & Debt by Stanley J. Targosz III

Gain iDecide Familiarity (Video) & Listen to the Podcast (Audio)



2

CO-OP PROGRAM: WEEK TWO



MENTORSHIP

1. Record your 'Elevator Pitch' and send it to your mentor for review.
2. Schedule a call with your mentor to discuss your Elevator pitch as well as your Income Calculator. This is aimed to help you set the bar for yourself and understand your workload to achieve your standard.

INDUSTRY BUILDING BLOCKS

1. Office Hours – Review sample debt and college debt solutions, products and overview of solution delivery.
2. Roleplay your Elevator Pitch and listen for constructive feedback.

LEARNING OBJECTIVES

Opening conversations and 'lingo' to effectively communicate with your mentor.

Understand technological platforms.

General understanding of income potential and goals.

Acquire assignments and benchmarks for successful completion of the program.
Start scheduling your calendar!



2

CO-OP PROGRAM: WEEK TWO



TECHNOLOGY & BRANDING TRAINING

Connect with all university groups available to you on social media platforms.

- LinkedIn
- TikTok
- Instagram/Facebook
- etc.

VALIDATION | PRODUCTION | REVENUE

VOTS Assignment – 5 30 second videos of students or recent graduates talking about:

- What would it mean to have a clear-guided path to eliminate student debt?
- Do you have a strategy in place for building an appropriate emergency fund?
- Do you know others that have struggled paying-off student debt?

Referral system (iDecide)

PROJECTED OUTCOMES

You should feel comfortable with starting 'door-opener' conversations, creating a list of potential opportunities (i.e. association alumni, networking, etc.), and gain a basic understanding of industry and products.

NOTES:



CO-OP PROGRAM: WEEK TWO



MY LEARNINGS FOR THIS WEEK: *TOP 5*

- 1
- 2
- 3
- 4
- 5

MY TOP CHALLENGES THIS WEEK:

Onto Week 3 →

3

CO-OP PROGRAM: WEEK THREE



OVERVIEW

By week 3 you should have completed basic licensing work and should have already or by this week scheduled your licensing exam. This will provide some continued study time while you begin to build industry perspective and naturalize marketing approach and fact finding. (Caution: licensing is done on a basic level and the nuance that product companies build into products are more advanced. We are trying to get the licensing done quickly, as seasoned advisors often struggle with the difference between the licensing answers and the more advanced reality of client solutions and management.)

GOALS

Schedule State Licensing Exam

Review primary carrier companies gaining a insight into their product portfolios and understanding the various contexts for client solutions.

Introduction to Goal Planning and how holistic approach can coalesce a better usage of client's financial resources. Maybe it's flexible priorities, but it's definitely cash flow management.

Utilizing budgeting tools, transfers, and facilitating agreement.

READING/VIDEO

Begin study for Certified College Debt Elimination Specialist and/or Certified Debt Specialist

Greg S. video training on term product. (Video)

Video on when term is appropriate





CO-OP PROGRAM: WEEK THREE



MENTORSHIP

1. First mentored Fact Finder Meeting
2. Complete your OWN Solution (real or made-up) and review with mentor
3. Mentorship Call – Review Fact Finder meeting

INDUSTRY BUILDING BLOCKS

1. Office Hours – Industry & Product Understanding
2. Hero & Quility Microsoft Teams Training

LEARNING OBJECTIVES

Build a revenue, or income, goal and map to success with your mentor.

Understand all avenues to achieve your goal.

Gain a second level of conversation skills.

Acquire assignments and benchmarks for successful completion of the program.



3

CO-OP PROGRAM: WEEK THREE



TECHNOLOGY & BRANDING TRAINING

Connect with all university groups available to you on social media platforms.

- LinkedIn
- TikTok
- Instagram/Facebook
- etc.

VALIDATION | PRODUCTION | REVENUE

VOTS Assignment – 5 30 second videos of students or recent graduates talking about:

- o What is the biggest financial challenge that you will face in the next 10 years?
- o Is there an income gap that you anticipate with your full-time employment and your short/near-term goals?
- o What activities or side hustles are you undertaking to close the income gap?

Beginning client interactions can be very revealing.

PROJECTED OUTCOMES

Your week three takeaways should look like:

1. Answering basics questions about “what you do”.
2. Have some scheduled one-on-one conversations & ‘decision maker’ conversations in cue.
3. Create a Conversation Outline Notebook for different scenarios. (Ongoing activity)

NOTES:



CO-OP PROGRAM: WEEK THREE



MY LEARNINGS FOR THIS WEEK: *TOP 5*

- 1
- 2
- 3
- 4
- 5

MY TOP CHALLENGES THIS WEEK:

Onto Week 4 →



4

CO-OP PROGRAM: WEEK FOUR

OVERVIEW

Week Four should conclude the early licensing portion of training with a transition toward client facing skills. This week you will be mentored through a solution meeting, learning to leverage the important information that clients provide during Fact Finding to drive goal planning. You will be exposed to presentation materials and sales tools and learn how to deploy them in a one-on-one environment. At this point you will have gotten some perspective on the industry, licensing, client approach, and fact finding beginning the client presentation process.

GOALS

Pass State Licensing Exam

Understand the Debt and College Debt Elimination solutions, Fact Finding process, and begin round-table discussions of the solutions.

Appreciate thorough fact finding and how that impact both goal planning and holistic planning.

Explore a real world client solutions example.

READING/VIDEO

Review Solutions Roundtable/Office Hours

Suggested Reading – How To Win Friends and Influence People by Dale Carnegie





CO-OP PROGRAM: WEEK FOUR



MENTORSHIP

1. First Solutions Meeting
2. Second Fact Finder Meeting
3. Introductory conversation to complete the appointment process

INDUSTRY BUILDING BLOCKS

1. Office Hours – Group discussion about first fact finders; learnings and anecdotes.
2. National Life Group Introductory webinar
3. Apply for Error & Omissions (E&O) Insurance

LEARNING OBJECTIVES

See and understand prospect flow from initial conversation to financial foundations.

Know the impact of the 1st conversation on the 2nd.

Review progress with Mentor.

Objection handling.

Understand the importance of good fact finding and tone-setting for the solution.



4

CO-OP PROGRAM: WEEK FOUR



TECHNOLOGY & BRANDING TRAINING

Connect with all university groups available to you on social media platforms.

- LinkedIn
- TikTok
- Instagram/Facebook
- etc.

VALIDATION | PRODUCTION | REVENUE

VOTS Assignment – Submit 5 30 second videos of students or recent graduates talking about:

- o What is the cost of your short/near-term goals?
- o Do you have a strategy for those accumulation goals?
- o What steps have you taken to initiate those goals?
- o How would you define financial success?

PROJECTED OUTCOMES

In week 4, you should be able to fully comprehend the revenue opportunity for helping others in your community. You should also be able to understand drip communications campaigns and follow-up communication after a solutions meeting. Keep in mind that timeliness and cadence is key.

NOTES:



CO-OP PROGRAM: WEEK FOUR



MY LEARNINGS FOR THIS WEEK: *TOP 5*

1

2

3

4

5

MY TOP CHALLENGES THIS WEEK:

Onto Week 5 →

5

CO-OP PROGRAM: WEEK FIVE



OVERVIEW

Week five provides a further glimpse into the sales process, taking our first client experience into the decision stage. At this point we will be diving into product Company resources to answer technical questions for a client experiencing the financial services world firsthand. Not all client experiences are the same, some come with learnings that they must undo, a lack of knowledge around financial services topics, or a perceived strength in knowledge that you need to further educate. At this stage we learn to serve as educators to help build a strategy that injects realism, protects the client goals while holding them accountable to agreed upon success metrics, and infuses the flexibility to accomplish their goals with eyes-wide-open to unintended consequences.

GOALS

Participate in the sales process through decision stage.

Begin the repetition and practice of professional financial services.

Understanding the nuance that makes a product design and a client needs work together to solve a specific goal.

Begin appointment process with carriers.

READING/VIDEO

Listen to The Responsible Network's Agent Podcast

Suggested Reading – The Power of Positive Thinking by Norman Vincent Peale

5

CO-OP PROGRAM: WEEK FIVE



MENTORSHIP

1. Second Solutions Meeting
2. Application and Closing / Follow-up / Next Steps
3. Third Fact Finder Meeting (begin more active participation in meeting)

INDUSTRY BUILDING BLOCKS

1. Office Hours – Group discussion about product selection and information.
2. Additional carrier information
3. Complete AML (Anti-Money Laundering) training

LEARNING OBJECTIVES

Starting to lead the process during conversations. Taking the reigns.

Owning the client communications process.

Understand emotional tie-downs.

It is important that you feel confident in the process and tracking progress.



5

CO-OP PROGRAM: WEEK FIVE



TECHNOLOGY & BRANDING TRAINING

Connect with all university groups available to you on social media platforms.

- LinkedIn
- TikTok
- Instagram/Facebook
- etc.

VALIDATION | PRODUCTION | REVENUE

VOTS Assignment – 3 1-minute videos of students or recent graduates talking about:

- o When you think of money do you think about pain or hope?
- o How much control do you have on your financial future?
- o What would give you more control?

PROJECTED OUTCOMES

Your week 5 outcomes should result in you having a deeper understanding of marketing growth and tactics, case design application in the real world, and you should begin to practice solutions delivery. This process should be building your confidence and the results of that built-up confidence should be evident in your communication, timeliness, and picture of what we are driving toward.

NOTES:



CO-OP PROGRAM: WEEK FIVE



MY LEARNINGS FOR THIS WEEK: *TOP 5*

1

2

3

4

5

MY TOP CHALLENGES THIS WEEK:

Onto Week 6 →



6

CO-OP PROGRAM: WEEK SIX

OVERVIEW

Week six seeks begins integration with the product carriers and their proprietary platforms. As you begin the appointment process with these carriers you will gain access to product specific training. This will begin to formalize the utilization of products in the "real world" and create an understanding of the industry perspective on products. (This will also make you eligible to receive commissions if you desire.) As we start to see multiple solutions meetings we are better able to distinguish the nuance of a solution and the inflection of a product.

GOALS

Create Your Own Solution. Doesn't matter whether you are solving your own problem or running an aspirational scenario. Make it REAL. Make it mean something to yourself! (We're NOT telling you to sell something to yourself.) But make it something that helps you understand the levers that can be pulled within financial services solutions; that makes you better at explaining a product to someone in the future; and hopefully cements some GOALS for YOURSELF!

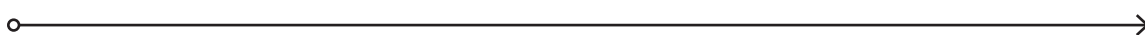
Begin appointment process with carriers.

Begin appointment process with carriers.

READING/VIDEO

Listen to The Responsible Network's Agent Podcast

Suggested Reading – Rich Dad, Poor Dad by Robert Kiyosaki





CO-OP PROGRAM: WEEK SIX



MENTORSHIP

1. Third Solutions Meeting
2. Application and Closing / Follow-up / Next Steps (2)
3. Fourth Fact Finder Meeting (begin more active participation in meeting)

INDUSTRY BUILDING BLOCKS

1. Office Hours – NEED A TOPIC FOR OFFICE HOURS
2. My Impact - My Solution
3. Schedule a call with your mentor to discuss your upcoming revenue calendar.

LEARNING OBJECTIVES

Begin taking a bigger role during Fact Finder and Solutions Conversations.

Plan solo case opportunities with your peers.

Begin to map out your post Co-Op plan.



6

CO-OP PROGRAM: WEEK SIX



TECHNOLOGY & BRANDING TRAINING

Connect with all university groups available to you on social media platforms.

- LinkedIn
- TikTok
- Instagram/Facebook
- etc.

VALIDATION | PRODUCTION | REVENUE

VOTS Assignment – 3 1-minute videos of yourself, students or recent graduates talking about:

- o As a young advisor how can you impact future client's decision making?
- o What have you learned about the financial services industry that you didn't understand before and that you believe every young consumer should know?
- o Is there one piece of advice that you believe every person with student debt should know?

PROJECTED OUTCOMES

In Week 6, you should have a firm grasp on the underwriting and industry process, timing, and 'lingo'; knowing how to keep a prospect engaged, make them see their plan in action, and prevent them from going dark.

NOTES:



CO-OP PROGRAM: WEEK SIX



MY LEARNINGS FOR THIS WEEK: *TOP 5*

1

2

3

4

5

MY TOP CHALLENGES THIS WEEK:

Onto Week 7 →



7

CO-OP PROGRAM: WEEK SEVEN

OVERVIEW

Week seven will begin the process of understanding solutions design. This is where industry products meet financial professionals to create goal planning solution for clients. We'll spend the balance of the 15 weeks on the intersection between acquiring enough information to build an appropriate strategies while also understanding the variables necessary to advocate for not only the client but their goals inside of the financial services world.

GOALS

Gain a working understanding of the financial solutions that we utilize

Looking ID Transfers? This one is a note from Bob

Understand how products are used specifically to help clients' goals and priorities.

Intentionality of product selection.

READING/VIDEO

Introduction to Case Design (Video)

Suggested Reading – See You at the Top by Zig Ziglar

Listen to The Responsible Network© Agent Podcast



7

CO-OP PROGRAM: WEEK SEVEN



MENTORSHIP

1. Fourth Solutions Meeting
2. Application and Closing / Follow-up / Next Steps (3)
3. Fifth Fact Finder Meeting (demonstrate active participation in meeting)
4. Video presentation of a solutions meeting (your own, 1 that you want to present yourself, or mock solution)

INDUSTRY BUILDING BLOCKS

1. Office Hours – NEED AN OFFICE HOURS TOPIC
2. Use an illustration software and gain familiarity by designing 1 Indexed Universal Life Policy.

LEARNING OBJECTIVES

Complete the Fact Finder to Case Design submission without the prodding of your mentor.

Understand the 'buffers' and healthy construction of an IUL.

Be able to explain to a colleague and/or 'new agent' the Apprentice Stage and its benefits.





CO-OP PROGRAM: WEEK SEVEN



TECHNOLOGY & BRANDING TRAINING

Connect with all university groups available to you on social media platforms.

- LinkedIn - Begin posting podcast episodes on LinkedIn.
- Instagram/Facebook
- etc.

Create a video to develop your personal brand and gain a larger following.

VALIDATION | PRODUCTION | REVENUE

VOTS Assignment – 5 thirty second videos on:

- o How would understanding cash flow as a critical component to finance change current or future decisions you would make?
- o What exposure (classes, books or videos) do you have to cash flow management?
- o What does the financial services industry push most to young consumers in your demographic (credit cards, debt consolidation, investment products, financial widgets or tools, savings strategies, insurance...)?

PROJECTED OUTCOMES

You should begin the product carrier application process and familiarize yourself with iGoPipeline. Additionally, you should understand how to accurately calculate your commissions.

Answer this question: Why do we choose the product carriers we do?

NOTES:



CO-OP PROGRAM: WEEK SEVEN



MY LEARNINGS FOR THIS WEEK: *TOP 5*

- 1
- 2
- 3
- 4
- 5

MY TOP CHALLENGES THIS WEEK:

Onto Week 8 →

8

CO-OP PROGRAM: WEEK EIGHT



OVERVIEW

Week eight will refocus on marketing strategies, outreach and how they function as revenue fulcrums to the financial services industry. How much marketing activity is necessary to support varying earnings potential? How does that translate across the industry; and not just with your first opportunity but further into an industry career paths. What does a full-time retail financial services schedule look like? You see, there is a lot to like about the industry; compensation, flexibility, perks, and most importantly impacting people. However, there is enough to dislike about the industry – but if you learn how to fill-in the supplemental continuing education, manage the persistent follow-up, and control new client acquisition and revenue goals with consistency you can have a fulfilling career.

GOALS

Understanding Revenue: Opportunities, Products, Industry, and How Commissions Drive All Levels of Financial Services Compensation.

How to leverage natural market competences into casual habits instead of tasks.

Centers of Influence: Mind-Mapping, Digital Integration Strategies, and Identifying Focal Points

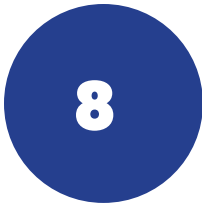
READING/VIDEO

Inner-workings of an IUL: A Message from Case Design (Video)

Suggested Reading – The Richest Man in Babylon by George Clason

Listen to The Responsible Network© Agent Podcast





CO-OP PROGRAM: WEEK EIGHT



MENTORSHIP

1. Fifth Solutions Meeting
2. Application and Closing/Follow-Up/Next Steps (4)
3. Sixth Fact Finder Meeting - Demonstrate active participation in meetings

INDUSTRY BUILDING BLOCKS

1. Office Hours: Game Planning
2. What does a Full-Time and a Part-Time schedule look like and how does that translate to earnings potential?
3. Mind-Mapping Exercises
4. Historical Concepts Overview: IBS, YFB, Bank on Yourself, Circle of Wealth, Leap, etc.)

LEARNING OBJECTIVES

Take a look at a Full-Time Calendar vs. a Part-Time Calendar.

Confident and Comfortable running a fact finder.

Know how to advance a case through underwriting.

Objection Handling - A look into the conference room when met with hesitation.



8

CO-OP PROGRAM: WEEK EIGHT



TECHNOLOGY & BRANDING TRAINING

- Referral Video: A "soft ask" video that can be used on social media platforms, sent individually, or marketed as an advertisement (optional).
- Personal Brand Advancement: Use The Responsible Network© as validation while simultaneously highlighting yourself as the expert.

VALIDATION | PRODUCTION | REVENUE

VOTS Assignment – Needs to be determined

Tracking Case Design Quoted pipeline (ex: Annual Premium, Target Premium, etc.)

- Closing Percentage, Realistic Short-Term Revenue, Long-Term Revenue, Referral Opportunities.

PROJECTED OUTCOMES

This week you should leave with a deeper understanding of the different products we use, why we use them, when they are applicable, and how they will impact a client's life in the short and long term. With this in mind, you need to have a clear picture on how to "close" a client. Have a clear grasp on laddering strategies, debt payoff redirection, client career growth and how they positively impact the stability and growth inside of an IUL.

NOTES:



CO-OP PROGRAM: WEEK EIGHT



MY LEARNINGS FOR THIS WEEK: *TOP 5*

1

2

3

4

5

MY TOP CHALLENGES THIS WEEK:

Onto Week 9 →



9

CO-OP PROGRAM: WEEK NINE

OVERVIEW

Week nine will focus on Sales skills. Whether you end-up in a wholesale environment or are destined to do client services; selling is a key part to a professional career. Have you ever heard the phrase "Selling is part of every job. The difference is only who you are selling to." How do you set the stage to "know your client?" How do you help them understand what questions are important to them? And how do you push through "noise" of the industry, people's personal opinions or experiences, and the role of industry sales and marketing play in consumers awareness.

GOALS

Close the outstanding business you have on the table.

After closing business, you need to understand how to naturally ask for referrals.

Begin the process of natural market harvesting from closed business relationships, pre-existing relationships.

READING/VIDEO

NEED A VIDEO

Suggested Reading - As a Man Thinketh by James Allen

Listen to The Responsible Network© Agent Podcast





CO-OP PROGRAM: WEEK NINE



MENTORSHIP

1. Sixth Solutions Meeting
2. Application and Closing/Follow-Up/Next Steps (4)
3. Seventh Fact Finder Meeting - Demonstrate active participation in meetings
4. Sales Skills Exercise

INDUSTRY BUILDING BLOCKS

1. Office Hours
2. Primerica, PHP, Career/Captive & Independent: Let's talk about what the industry offers. (The Enemy Conversation)

LEARNING OBJECTIVES

Determining and Understanding the Psychology of Sales. Your Mindset.

WE NEED ANOTHER LEARNING OBJECTIVE





CO-OP PROGRAM: WEEK NINE



TECHNOLOGY & BRANDING TRAINING

Connect with all university groups available to you on social media platforms.

- LinkedIn
- TikTok
- Instagram/Facebook
- etc.

VALIDATION | PRODUCTION | REVENUE

VOTS Assignment – Please submit three one-minute videos from prospects explaining:

- Where do you get your financial information from?
- How do you research financial products that you need to purchase?
- What resources do you rely on to learn about financial resources that you are not familiar with?

PROJECTED OUTCOMES

At this point, you should be looking over your past cases and gain an accurate depiction of your success rate, or your closing percentage. Also, you should be able to identify "high level" cases.

NOTES:



CO-OP PROGRAM: WEEK NINE



MY LEARNINGS FOR THIS WEEK: *TOP 5*

- 1
- 2
- 3
- 4
- 5

MY TOP CHALLENGES THIS WEEK:

Onto Week 10 →



OVERVIEW

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GOALS

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READING/VIDEO

NEED A VIDEO

Suggested Reading – As a Man Thinketh by James Allen

Listen to The Responsible Network© Agent Podcast



CO-OP PROGRAM: WEEK TEN



MENTORSHIP

- 1. Sixth Solutions Meeting
- 2. Application and Closing/Follow-Up/Next Steps (4)
- 3. Seventh Fact Finder Meeting - Demonstrate active participation in meetings
- 4. Sales Skills Exercise

INDUSTRY BUILDING BLOCKS

- 1. Office Hours
- 2. Primerica, PHP, Career/Captive & Independent: Let's talk about what the industry offers. (The Enemy Conversation)

LEARNING OBJECTIVES

Determining and Understanding the Psychology of Sales. Your Mindset.

WE NEED ANOTHER LEARNING OBJECTIVE





TECHNOLOGY & BRANDING TRAINING

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- TikTok
- Instagram/Facebook
- etc.

VALIDATION | PRODUCTION | REVENUE

VOTS Assignment – Please submit three one-minute videos from prospects explaining:

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- What resources do you rely on to learn about financial resources that you are not familiar with?

PROJECTED OUTCOMES

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NOTES:



CO-OP PROGRAM: WEEK TEN



MY LEARNINGS FOR THIS WEEK: *TOP 5*

1

2

3

4

5

MY TOP CHALLENGES THIS WEEK:

Onto Week 11 →

11

CO-OP PROGRAM: WEEK ELEVEN



OVERVIEW

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GOALS

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Begin the process of natural market harvesting from closed business relationships, pre-existing relationships.

READING/VIDEO

NEED A VIDEO

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CO-OP PROGRAM: WEEK ELEVEN



MENTORSHIP

1. Sixth Solutions Meeting
2. Application and Closing/Follow-Up/Next Steps (4)
3. Seventh Fact Finder Meeting - Demonstrate active participation in meetings
4. Sales Skills Exercise

INDUSTRY BUILDING BLOCKS

1. Office Hours
2. Primerica, PHP, Career/Captive & Independent: Let's talk about what the industry offers. (The Enemy Conversation)

LEARNING OBJECTIVES

Determining and Understanding the Psychology of Sales. Your Mindset.

WE NEED ANOTHER LEARNING OBJECTIVE





CO-OP PROGRAM: WEEK ELEVEN



TECHNOLOGY & BRANDING TRAINING

Connect with all university groups available to you on social media platforms.

- LinkedIn
- TikTok
- Instagram/Facebook
- etc.

VALIDATION | PRODUCTION | REVENUE

VOTS Assignment – Please submit three one-minute videos from prospects explaining:

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- How do you research financial products that you need to purchase?
- What resources do you rely on to learn about financial resources that you are not familiar with?

PROJECTED OUTCOMES

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NOTES:



CO-OP PROGRAM: WEEK ELEVEN



MY LEARNINGS FOR THIS WEEK: *TOP 5*

- 1
- 2
- 3
- 4
- 5

MY TOP CHALLENGES THIS WEEK:

Onto Week 12 →



OVERVIEW

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GOALS

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READING/VIDEO

NEED A VIDEO

Suggested Reading - As a Man Thinketh by James Allen

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**MENTORSHIP**

1. Sixth Solutions Meeting
2. Application and Closing/Follow-Up/Next Steps (4)
3. Seventh Fact Finder Meeting - Demonstrate active participation in meetings
4. Sales Skills Exercise

INDUSTRY BUILDING BLOCKS

1. Office Hours
2. Primerica, PHP, Career/Captive & Independent: Let's talk about what the industry offers. (The Enemy Conversation)

LEARNING OBJECTIVES

Determining and Understanding the Psychology of Sales. Your Mindset.

WE NEED ANOTHER LEARNING OBJECTIVE





TECHNOLOGY & BRANDING TRAINING

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- LinkedIn
- TikTok
- Instagram/Facebook
- etc.

VALIDATION | PRODUCTION | REVENUE

VOTS Assignment – Please submit three one-minute videos from prospects explaining:

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- How do you research financial products that you need to purchase?
- What resources do you rely on to learn about financial resources that you are not familiar with?

PROJECTED OUTCOMES

At this point, you should be looking over your past cases and gain an accurate depiction of your success rate, or your closing percentage. Also, you should be able to identify "high level" cases.

NOTES:



CO-OP PROGRAM: WEEK TWELVE



MY LEARNINGS FOR THIS WEEK: *TOP 5*

- 1
- 2
- 3
- 4
- 5

MY TOP CHALLENGES THIS WEEK:

Onto Week 13 →



OVERVIEW

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GOALS

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READING/VIDEO

NEED A VIDEO

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**MENTORSHIP**

1. Sixth Solutions Meeting
2. Application and Closing/Follow-Up/Next Steps (4)
3. Seventh Fact Finder Meeting - Demonstrate active participation in meetings
4. Sales Skills Exercise

INDUSTRY BUILDING BLOCKS

1. Office Hours
2. Primerica, PHP, Career/Captive & Independent: Let's talk about what the industry offers. (The Enemy Conversation)

LEARNING OBJECTIVES

Determining and Understanding the Psychology of Sales. Your Mindset.

WE NEED ANOTHER LEARNING OBJECTIVE





TECHNOLOGY & BRANDING TRAINING

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- LinkedIn
- TikTok
- Instagram/Facebook
- etc.

VALIDATION | PRODUCTION | REVENUE

VOTS Assignment – Please submit three one-minute videos from prospects explaining:

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- How do you research financial products that you need to purchase?
- What resources do you rely on to learn about financial resources that you are not familiar with?

PROJECTED OUTCOMES

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NOTES:



CO-OP PROGRAM: WEEK THIRTEEN



MY LEARNINGS FOR THIS WEEK: *TOP 5*

1

2

3

4

5

MY TOP CHALLENGES THIS WEEK:

Onto Week 14 →

**OVERVIEW**

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GOALS

Close the outstanding business you have on the table.

After closing business, you need to understand how to naturally ask for referrals.

Begin the process of natural market harvesting from closed business relationships, pre-existing relationships.

READING/VIDEO

NEED A VIDEO

Suggested Reading – As a Man Thinketh by James Allen

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CO-OP PROGRAM: WEEK FOURTEEN



MENTORSHIP

1. Sixth Solutions Meeting
2. Application and Closing/Follow-Up/Next Steps (4)
3. Seventh Fact Finder Meeting - Demonstrate active participation in meetings
4. Sales Skills Exercise

INDUSTRY BUILDING BLOCKS

1. Office Hours
2. Primerica, PHP, Career/Captive & Independent: Let's talk about what the industry offers. (The Enemy Conversation)

LEARNING OBJECTIVES

Determining and Understanding the Psychology of Sales. Your Mindset.

WE NEED ANOTHER LEARNING OBJECTIVE





TECHNOLOGY & BRANDING TRAINING

Connect with all university groups available to you on social media platforms.

- LinkedIn
- TikTok
- Instagram/Facebook
- etc.

VALIDATION | PRODUCTION | REVENUE

VOTS Assignment – Please submit three one-minute videos from prospects explaining:

- Where do you get your financial information from?
- How do you research financial products that you need to purchase?
- What resources do you rely on to learn about financial resources that you are not familiar with?

PROJECTED OUTCOMES

At this point, you should be looking over your past cases and gain an accurate depiction of your success rate, or your closing percentage. Also, you should be able to identify "high level" cases.

NOTES:



CO-OP PROGRAM: WEEK FOURTEEN



MY LEARNINGS FOR THIS WEEK: *TOP 5*

1

2

3

4

5

MY TOP CHALLENGES THIS WEEK:

Onto Week 15

**OVERVIEW**

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GOALS

Close the outstanding business you have on the table.

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Begin the process of natural market harvesting from closed business relationships, pre-existing relationships.

READING/VIDEO

NEED A VIDEO

Suggested Reading – As a Man Thinketh by James Allen

Listen to The Responsible Network© Agent Podcast



CO-OP PROGRAM: WEEK FIFTEEN



MENTORSHIP

1. Sixth Solutions Meeting
2. Application and Closing/Follow-Up/Next Steps (4)
3. Seventh Fact Finder Meeting - Demonstrate active participation in meetings
4. Sales Skills Exercise

INDUSTRY BUILDING BLOCKS

1. Office Hours
2. Primerica, PHP, Career/Captive & Independent: Let's talk about what the industry offers. (The Enemy Conversation)

LEARNING OBJECTIVES

Determining and Understanding the Psychology of Sales. Your Mindset.

WE NEED ANOTHER LEARNING OBJECTIVE





TECHNOLOGY & BRANDING TRAINING

Connect with all university groups available to you on social media platforms.

- LinkedIn
- TikTok
- Instagram/Facebook
- etc.

VALIDATION | PRODUCTION | REVENUE

VOTS Assignment – Please submit three one-minute videos from prospects explaining:

- Where do you get your financial information from?
- How do you research financial products that you need to purchase?
- What resources do you rely on to learn about financial resources that you are not familiar with?

PROJECTED OUTCOMES

At this point, you should be looking over your past cases and gain an accurate depiction of your success rate, or your closing percentage. Also, you should be able to identify "high level" cases.

NOTES:



CO-OP PROGRAM: WEEK FIFTEEN



MY LEARNINGS FOR THIS WEEK: *TOP 5*

1

2

3

4

5

MY TOP CHALLENGES THIS WEEK:

Congratulations! You have completed your 15 Week Co-Op Program.
