

# New Associate Information

Name: \_\_\_\_\_ Assoc. # \_\_\_\_\_

Spouse's Name: \_\_\_\_\_ D.O.B. \_\_\_\_\_ S-D.O.B. \_\_\_\_\_

Address: \_\_\_\_\_ City: \_\_\_\_\_

State \_\_\_\_\_ Zip \_\_\_\_\_ E-mail \_\_\_\_\_

Home # \_\_\_\_\_ Bus # \_\_\_\_\_ Work # \_\_\_\_\_

Cell # \_\_\_\_\_ S-Cell # \_\_\_\_\_ Fax # \_\_\_\_\_

Start date \_\_\_\_/\_\_\_\_/\_\_\_\_ Sr. Assoc. \_\_\_\_/\_\_\_\_/\_\_\_\_ Manager \_\_\_\_/\_\_\_\_/\_\_\_\_ Director \_\_\_\_/\_\_\_\_/\_\_\_\_

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## Goals & Dreams..... Their WHY!

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### Checklist:

- 1. Welcome call.
- 2. Phone Team with Top 10 Prospects.
- 3. Conduct first Sit-down.
- 4. Conduct first PBR.
- 5. Advance to Senior Associate.
- 6. Team Conference Call Participant.
- 7. Go over G.P.S.
- 8. Attend 1<sup>st</sup>. Business Briefing.
- 9. Recruit 2 more associates.
- 10. Attend the local Team Training.
- 11. Qualify for Players Club.
- 12. Promote to Manager.

### Notes:

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