




Fast Start Packet

A Transamerica Company



*Take the first steps toward building
the business you've always wanted.*

Name: _____

Date Started: _____

Licensed Trainer: _____

Senior Marketing Director (SMD): _____

Top 25 Market List

Reviewed by:

_____	_____	_____	_____
Initials	Print Name	Initials	Print Name

Field Training

Reviewed by:

_____	_____	_____	_____
Initials	Print Name	Initials	Print Name

Guest (BPM/One-on-One)

Reviewed by:

_____	_____	_____	_____
Initials	Print Name	Initials	Print Name

WFG Financial Needs Analysis

Reviewed by:

_____	_____	_____	_____
Initials	Print Name	Initials	Print Name

Training Materials

Reviewed by:

_____	_____	_____	_____
Initials	Print Name	Initials	Print Name

This associate is qualified to attend the Fast Start School on: _____

SMD Signature: _____



Part 1

Complete the following within the next **10 days** to qualify for Fast Start Training. Part 1 must be completed prior to Fast Start Training attendance.

Step 1 Complete the Top 25 Target Market List

Date Completed: _____

Step 2 Begin Field Training

Date Completed: _____

Step 3 Bring a Guest to a BPM or Have a One-on-One Overview

Date Completed: _____

Step 4 Complete your WFG Financial Needs Analysis*

Date Completed: _____

Step 5 Obtain & Review Fast Start Training Material:
The WFG System Manual

Date Completed: _____

* The WFG Financial Needs Analysis, developed by World Financial Group, is based on the accuracy and completeness of the data provided by the client. The analysis uses sources that are believed to be reliable and accurate, although they are not guaranteed. Discuss any legal, tax or financial matter with the appropriate professional. Neither the information presented nor any opinion expressed constitutes a solicitation for the purchase or sale of any specific security or financial service.

Step 1 Complete Top 25 Target Market List

Executive Memory Jogger

Coworker	Highway Patrolman	Softball Player	Sunday School Teacher
Boss	Security Guard	Baseball Player	Army
Supervisor	Armored Car Driver	Football Player	Navy
Manager	Highway Dept. Employee	Soccer Player	Air Force
Executive Assistant	Contractor	Racquetball Player	Marines
Personnel Manager	Home Builder	Basketball Player	Civic Club
Partner	Carpenter	Handball Player	Jaycees
Salesperson	Plumber	Swimmer	Kiwanis
Customer	Painter	Mountain Climber	Lions Club
Landlord	Roofer	Hiker	Principal
Parking Attendant	Insulator	Camper	Teacher
Coffee Shop	Landscaper	Jogger	Coach
Car Pool	Architect	Plays Bridge	Music Teacher
Lunch Friend	Surveyor	Plays Bingo	Piano Teacher
Competitor	Carpet Layer	Plays Table Tennis	Piano Tuner
Someone who hates to lose	Electrician	Plays Pool	Dance Teacher
Union Member	Repairman	Hang Glider	Professor
Complainer	Home Siding Salesperson	Enjoys Karate	Librarian
Inspector	Realtor	Fire Chief	Bus Driver
Pension Plan Manager	Department Store	Fireman	Chamber of Commerce
Delivery Person	Employee	Ambulance Driver	Hotel Employee
Express Mail Person	Cosmetics Salesperson	Scoutmaster	Radio Announcer
Mailman	Grocery Store Employee	Den Leader	Sportscaster
Someone who lost a job	Convenience Store Employee	Barber	Writer
Someone who almost lost job	Cashier	Beautician	Journalist
Job-hunting friend	Vending Salesman	Health Spa Employee	Editor
Someone who hates his/her job	Farmer	Tanning Salon Employee	Publisher
Someone who wasn't promoted	Caterer	Auctioneer	Pilot
Seeking a part-time job	Restaurant Owner	Photographer	Flight Attendant
Walking Encyclopedia	Waitress	Guidance Counselor	Air Traffic Control
Likable Person	Waiter	Youth Director	Travel Agent
Movers/Shakers	Chef	Sister-in-law	Antiques Dealer
Clergyman	Baker	Brother-in-law	Fundraiser
Lawyer	Cook	Father-in-law	Tree Surgeon
Nurse	Dishwasher	Mother-in-law	Railroad Conductor/Worker
Dentist	Cabinetmaker	Brother	Game Warden
Orthodontist	Hardware Store	Sister	Veterinarian
Doctor	Truck Driver	Father	Cat Lover
Surgeon	Funeral Director	Mother	Dog Lover
Hospital Worker	Flower Shop Employee	Cousin	Animal Trainer
Chiropractor	Dry Cleaner	Aunt	Doll Maker
Therapist	Electronics Store Employee	Uncle	Health Food Shop
Pharmacist	TV Repairman	Grandfather	Seamstress
Eye Center Employee	Locksmith	Grandmother	Bookworm
Social Worker	Upholsterer	Niece	Lawn Maintenance
Direct Sales	Furniture Repairman	Nephew	Cell Phone Contact
Auto Mechanic	Appliance Salesperson	Sister's In-laws	Email Contact
Car Salesman	Cable TV Repairman	Brother's In-laws	Satellite TV Serviceman
Auto Repairman	Office Supplies Salesman	Best Friend	Engineer
Auto Supply Salesman	Machine Shop Employee	Spouse's Best Friend	Computer Technician
Tire Store Employee	Phone Installer	Babysitter	Computer Sales
Teacher	Pest Control	Neighbor	Computer Programmer
Substitute Teacher	Carpet Cleaners	Parents' Neighbor	Computer Whiz
Accountant	Bowler	Friends of Parents	Software Programmer
Banker	Hunter	Best Man	Computer Gamer
Bank Teller	Golfer	Maid of Honor	Graphic Designer
Credit Union Employee	Fisherman	Matron of Honor	Printer
Payroll Clerk	Tennis Player	Bridesmaids	
Notary Public	Skier	Ushers	
Policeman	Dart Player	Fellow Church Members	



Fast Start Worksheet

Associate Name: _____	SMD: _____
Date Completed: _____	SMD Approval: _____

Name	Profile
	12345678

Name	Profile	Name	Profile	Name	Profile	Name	Profile
1	12345678	26	12345678	51	12345678	76	12345678
2	12345678	27	12345678	52	12345678	77	12345678
3	12345678	28	12345678	53	12345678	78	12345678
4	12345678	29	12345678	54	12345678	79	12345678
5	12345678	30	12345678	55	12345678	80	12345678
6	12345678	31	12345678	56	12345678	81	12345678
7	12345678	32	12345678	57	12345678	82	12345678
8	12345678	33	12345678	58	12345678	83	12345678
9	12345678	34	12345678	59	12345678	84	12345678
10	12345678	35	12345678	50	12345678	85	12345678
11	12345678	36	12345678	61	12345678	86	12345678
12	12345678	37	12345678	62	12345678	87	12345678
13	12345678	38	12345678	63	12345678	88	12345678
14	12345678	39	12345678	64	12345678	89	12345678
15	12345678	40	12345678	65	12345678	90	12345678
16	12345678	41	12345678	66	12345678	91	12345678
17	12345678	42	12345678	67	12345678	92	12345678
18	12345678	43	12345678	68	12345678	93	12345678
19	12345678	44	12345678	69	12345678	94	12345678
20	12345678	45	12345678	70	12345678	95	12345678
21	12345678	46	12345678	71	12345678	96	12345678
22	12345678	47	12345678	72	12345678	97	12345678
23	12345678	48	12345678	73	12345678	98	12345678
24	12345678	49	12345678	74	12345678	99	12345678
25	12345678	50	12345678	75	12345678	100	12345678

Profile: (1) 25+ Years (2) Married (3) Children (4) Home Owner (5) Solid Business Background (6) Income (7) Dissatisfied (8) Entrepreneurial



Top 25 Worksheet

Associate Name: _____	SMD: _____
Date Completed: _____	SMD Approval: _____

	First Name	Last Name	R/F/A ¹	Phone Numbers	Profile ²	Hot Button ³	One on One	BPM	Comments
1					12345678				
2					12345678				
3					12345678				
4					12345678				
5					12345678				
6					12345678				
7					12345678				
8					12345678				
9					12345678				
10					12345678				
11					12345678				
12					12345678				
13					12345678				
14					12345678				
15					12345678				
16					12345678				
17					12345678				
18					12345678				
19					12345678				
20					12345678				
21					12345678				
22					12345678				
23					12345678				
24					12345678				
25					12345678				

1 (R) Relative (F) Friend (A) Acquaintance
 2 Profile: (1) 25+ Years (2) Married (3) Children (4) Home Owner (5) Solid Business Background (6) Income (7) Dissatisfied (8) Entrepreneurial
 3 Hot Button: Prospect's Hot Issue(s) beyond Profile (i.e. – unemployed, family, etc.)

Step 2 Begin Field Training

Go Out with a Qualified Trainer for Field Training

Participate in at least two Field Training sessions with a qualified trainer. Remember to have your field trainer sign this form to verify the training was completed.

Date	Prospect Name	Field Trainer Name & Signature
Date	Prospect Name	Field Trainer Name & Signature
Date	Prospect Name	Field Trainer Name & Signature
Date	Prospect Name	Field Trainer Name & Signature
Date	Prospect Name	Field Trainer Name & Signature
Date	Prospect Name	Field Trainer Name & Signature
Date	Prospect Name	Field Trainer Name & Signature
Date	Prospect Name	Field Trainer Name & Signature

Step 3 Bring a Guest to a BPM

Guest Name

Phone Number

Guest Name

Phone Number

Guest Name

Phone Number

Guest Name

Phone Number



Step 4 Complete Your Financial Needs Analysis

Date _____
Client Name _____ DOB _____ Non-Smoker Smoker
Spouse Name _____ DOB _____ Non-Smoker Smoker
Address _____
Home Phone _____ Work Phone _____
Cell Phone _____ E-mail _____

Goals

Retirement _____ Home _____ LTC _____ Retire Parents _____
Education _____ Vacation _____ Travel _____

Monthly Income

Combined Gross _____ Combined Net _____ Discretionary _____

Monthly Expense

Mortgage/Rent _____	Car Insurance _____
Car Payments _____	Life/Health Insurance _____
Utilities _____	Other Loans _____
Credit Cards _____	Car Maintenance/Gas _____
Food/Clothing _____	Personal Expenses _____
Property Insurance _____	Miscellaneous _____
	Total Expenses _____

Assets

Market Value of Home _____
Mutual Funds/Stocks _____
Life Insurance-Cash Value _____
Savings Account _____
Checking Account _____
Retirement Plan _____
Previous Year Tax Return _____

Liabilities

Mortgage _____
2nd Mortgage _____
Car Loan _____
Credit Cards _____
Personal Loans _____
Other Loans _____

Other Mortgage Information

Purchase Price _____ Outstanding Low Balances _____ Loan Rate _____
Years Due _____ Fixed _____ Variable _____ Term _____ Estimated FICO _____
Monthly Payment _____ Monthly Property Taxes _____ Monthly Hazard Insurance _____

How much could you comfortably afford to set aside in a lump sum each month to reach your goals?

\$200 \$300 \$400 Other: \$ _____

Follow-up Appointment Date _____ Client Signature: _____

Step 5 Obtain & Review Fast Start Training Materials

Read this manual and bring it to Fast Start Training:

- *WFG System Manual: Six Steps to Building a WFG Business* (Item # 1462)

Refer to the following resources as you build your business:

- *System Builder* by Xuan Nguyen (Item # X175)
- WFG Field Training modules on MyWFG

The printed materials listed above can be ordered through the eStore on MyWFG.com. To access the eStore, sign onto MyWFG, select Tools on the main navigation bar, and then go to Sales & Service and select eStore-Fulfillment. Look for the item numbers and place your order.

To access the training modules on MyWFG, select Tools on the main navigation bar. Then select Field Training Series under Licensing & Training.

Additional books that WFG associates have found useful and motivating in starting their businesses include:

- *Think & Grow Rich* by Napoleon Hill
- *Rich Dad, Poor Dad* by Robert Kiyosaki, Sharon Lechter
- *The Cashflow Quadrant* by Robert Kiyosaki, Sharon Lechter
- *How to Win Friends & Influence People* by Dale Carnegie
- *The 21 Irrefutable Laws of Leadership* by John C. Maxwell
- *How I Raised Myself from Failure to Success in Selling* by Frank Bettger

Part 2**

Admission Packet

Part 2 will be issued during the FAST START Training

Submit Your Securities Registration Paperwork

(U4 in the United States)

(Register for LLQP in Canada)

Date Completed: _____

Fast Start Training Attendance Date: _____ Deadline Date: _____

** You have 30 days following the date of FAST START TRAINING to complete Step 2.

Fast Start Packet Checklist

Cover Page – Approval Form (circle one)

1. Is the associate's name legible and spelled correctly? (The name displayed on the packet will be used on the Fast Start Certificate of Completion)	Yes	No
2. Are all lines on the cover page completed?	Yes	No
3. Has the Approval Committee initialed and approved completion of your packet as being correct, accurate & neat?	Yes	No
4. Did a Senior Marketing Director sign and approve the Fast Start Packet for admission?	Yes	No

Challenge #1 – Approval Form

1. Has Step 1 (Top 25 List) been completed?	Yes	No
2. Has Step 2 (Field Training) been started?	Yes	No
3. Has Step 3 (BPM/One-On-One) been completed?	Yes	No
4. Has Step 4 (WFG Financial Needs Analysis) been completed?	Yes	No
5. Has Step 5 (Fast Start Training Materials) been completed?	Yes	No

Fast Start – Worksheet

1. Do you have names on the list? If yes, How many? _____ (Use Executive Memory Jogger worksheet)	Yes	No
2. Do you have First and Last names?	Yes	No
3. Does each name have all applicable profiles circled?	Yes	No
4. Are names and circled numbers clear and easy to read?	Yes	No

Top 25 – Worksheet

1. Were all names on this list taken from the Fast Start Worksheet? (Names, numbers must be clear and easy to read)	Yes	No
2. Do you have all 25 required names on this list?	Yes	No
3. Does each name have all applicable profiles circled?	Yes	No
4. Is there either a home or office phone number for each name?	Yes	No

BPM/One-on-One – Worksheet/Approval Form

1. Is the new associate general information complete?	Yes	No
2. Is the new associate matched up with a qualified Field Trainer?	Yes	No

WFG Financial Needs Analysis – Worksheet

1. Has the associate completed the WFG Financial Needs Analysis?	Yes	No
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Challenge #2 – Approval Form

1. Did you understand that Step #2 will be issued during the Fast Start class?	Yes	No
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Note: If there are any "no" answers to any of the above questions, the entire packet will be rejected and your attendance to the Fast Start Training will be denied. If the packet was rejected, you have until 5 p.m. on the Friday before Fast Start Training to submit the corrected packet for approval by the committee.



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