



Pathway to Success

From Associate to Executive Director

- Full Version •



The Pathway to Success

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Congratulations and welcome to the UFinancial family. You have made a tremendous decision to be a part of a company that is committed to helping every individual, family, company and/or organization to achieve the goal of becoming completely debt free and to have the tremendous benefit of having a “Digital Financial Advisor” at their side for the rest of their lives. We are excited to have you working side by side with us. We will be sharing with you the proven guidelines, training processes and strategies of this amazing business opportunity. The leadership team at UFinancial is motivated in providing you a successful pathway to build a business that you can be proud of as you strive to achieve the goals and dreams for your future.

This is a tremendous company and the Money Max Account is continuing its’ history, which originally started in 2004, to help people from all walks of life to eliminate their debt, along with those who are adding new streams of income as agents with UFinancial (UFF). Our goal is to bring you the greatest business opportunity available in America. The \$8.5+ trillion financial industry is experiencing major changes and we are proud to say that UFF is leading the way.

Your new agent training program will provide the personal one-on-one and team training that you need to begin building your business. This will include field training, product and services knowledge, online and live business training classes and much more.

This “Pathway to Success” manual will guide you from your first day as an associate all the way to reaching the level of Executive Director and beyond. Always keep this manual available, so that you will have the information you need, at your fingertips, to accelerate your business to the levels that you desire to reach and then exceed.

Once again, welcome to United Financial Freedom. Let’s start your journey on the “Pathway to Success – From Associate to Executive Director”.





First Steps





The Pathway to Success

From Associate to Executive Director

Name: _____ Agent ID#: _____

My Support Team

Recruiter: _____ City/State: _____

Phone: _____ Email: _____

Certified Field Trainer: _____ City/State: _____

Phone: _____ Email: _____

Executive Director: _____ City/State: _____

Phone: _____ Email: _____

UFF Agent Support: 877-576-5563

Support@UFinancialFreedom.com

The Pathway to Success – First Steps

- SCHEDULE YOUR NEW AGENT ORIENTATION STRATEGY SESSION

DATE _____ TIME _____ LOCATION _____

- SET GPS1 APPOINTMENT TO RUN YOUR NUMBERS (Have Your Analysis Sheet Completed)

To Download the Analysis Worksheet: [CLICK HERE](#)

DATE _____ TIME _____ LOCATION _____

- SET GPS2 APPOINTMENT TO REVIEW YOUR DEBT FREE ANALYSIS RESULTS

DATE _____ TIME _____ LOCATION _____

- SCHEDULE YOUR MONEY MAX ACCOUNT PERSONAL COACHING SESSION

DATE _____ TIME _____ LOCATION _____

The Pathway to Success – Creating Your Foundation

“When you set forth a precise “Vision” or “Why” coupled with a well-designed and committed plan, this will produce within you an unequalled level of confidence, drive and an inner strength for success.” s.c.

Imagine that it is 3 years from today. Looking back, what would need to have happened for you to be genuinely happy with how your UFF business has impacted your life?

1. **WRITE YOUR “WHY”** Why are you part of this? What does it mean to you? Be specific.

MY “WHY” -

2. **GOALS – USE ACTIVITY COMPENSATION CALCULATOR!** – To Download – [Click Here](#)
 - a. How much do you need monthly? \$ _____
 - b. How long do you have to reach this? _____
 - c. Sr. Associate in 45 days: _____ Exec Dir. in 6 months: _____
 - d. Download Details of Associate to Executive Director in 6 Months: [Click Here](#)
3. **BUSINESS HOURS:** Mon: _____ Tues: _____ Wed: _____ Thurs: _____ Fri: _____ Sat: _____
4. **ACTIVITY LEVELS:** # Of Contacts per day: _____ per week: _____ per month: _____
5. **CONTACT LIST – Use the MEMORY JOGGER** Start a list of individuals who need to be debt free, people who need extra income, people looking for a new career. [Click Here](#)
6. **REVIEW SCRIPTS** and Role Play – Download Initial Prospecting Scripts – [Click Here](#)
7. **ACCOUNTABILITY**— What level do you want/need? Weak _____ Strong _____

8. **GETTING STARTED TRAINING** – Your first phase of training is set forth within a digital classroom. The “**Getting Started Training**” series is a set of nine videos to build your foundation and get you started on a solid pathway along with achieving success quickly. These videos, along with a vast array of resources for your UFF business are located in our Main Communications Portal: <https://UFFPowerTeam.com>.

Here are some action steps for you after you access the portal.

- a. Getting Started Training Series - Watch all videos within the first 48 hours (Menu Item – “*Getting Started Training*”) – [Click Here](#)
- b. Install Rapid Funnel (see item #2 in next section) and Watch Tutorial – [Click Here](#)
- c. Download Initial Contact Prospecting Script – [Click Here](#)
- d. Download Accountability Tracker – [Click Here](#)
- e. Download the Tri-Fold Success Guide – [Click Here](#)

9. **UFF AGENT BACK OFFICE** – Your UFF Agent Back Office has a wealth of information along with business tools that you will be referring to, interacting with and utilizing every day. Here is the access link: <https://portal.ufinancialfreedom.com/Account/Login>

- a. In the upper right-hand section of the back office you will see your name and are able to click on a drop-down list. Complete the following items
 - i. **Commission Payment Preferences** – Change the option from “Check” to “ACH” so that your commissions are directly deposited into your bank account. Just enter the routing number and account number.
 - ii. **Fill out your W-9 Form** – This needs to be completed and sent in to UFF to receive commissions. Email this to accounting@UFinancialFreedom.com or you can fax the completed form to 801-505-0228 – [Click Here for W9 Form](#)
 - iii. **Replicated Sites** – You are able to have your UFF agent websites customized. Enter your desired custom extension that will replace the agent ID number that is listed at the end of the site name. Make this a short and easy to remember name. i.e. First and Last Name or First Initial and Last Name. (JohnSmith or JSmith)
 - iv. **Change Password** – If you entered a “temporary” password when you first registered, change your password to a confidential one.

- b. Contact your sponsor and schedule to have your Debt Free Analysis run for you.
- c. Download and read the ***Debt to Wealth eBook***.
- d. Register for the UFF Corporate Training Calls for Agents held on Tuesday nights (Located under “Upcoming Webinars” in the lower left-hand area.)
- e. Take time to walk through the menus and sub-menu in your UFF back-office for a vast array of information and training documents.
- f. Download and read through the UFF Compensation Plan – [Click Here](#)
- g. Download and read through the UFF Policies and Procedures – [Click Here](#)
- h. In the bottom right-hand section of the home page is a section titled “Agent Training”. These are items that will assist you in all aspects of your UFF business.

Every day is an opportunity for you to enhance your successful UFF Business



“The realization of success belongs to those who prepare for it today...”

It was not raining while Noah was building the ark.”





First Steps

► **Chapter Resources** ◀



Pathway to Success from Associate to Executive Director in 6 Months

Areas of Performance	Month 1	Month 2	Month 3	Month 4	Month 5	Month 6
End of Month Promotion Level	Associate to Sr. Associate (3-2-1)	Director Plus CFT	Senior Director	Managing Director	Executive Director	Paid as an Executive Director
Recruits	3	3	2	1	1	3
Training Sales	2	3	3	4	4	4
Personal Sales	2	2	2	2	2	2
Team Personal Sales		1	1	2	2	3
Personal Sales Volume	10500	12250	12250	14000	14000	14000
Team Sales Volume	10500	21000	21000	28000	28000	31500
Cumulative Personal Volume	10500	22750	35000	49000	63000	77000
Cumulative Team Volume	10500	31500	52500	80500	108500	140000
Monthly Compensation	\$2,810	\$3,910	\$3,910	\$5,330	\$6,500	\$8,600
Monthly Bonus Pool		\$800	\$800	\$1,000	\$1,000	\$2,000
Cumulative Compensation	\$2,810	\$7,520	\$12,230	\$18,560	\$26,060	\$36,660
This Illustration is Using an Average Sale of \$3,500			Road to Executive Director: 6 Month Average Compensation - \$6,110/month			

DUPLICATION STARTS WITH PERSONAL ACTIVITY AND COMMITMENT	Weekly Activity Needed	Minimum Monthly Goals	Executive Director	Executive Director
Help your Agents to Receive the 3-2-1 Promotion and CFT Promotion	2-3 Prospects Presented	2-3 New Agent Recruits	\$150K per year*	\$200K per year*
A Minimum of 1 Agent Promotion Every 30-45 Days	The UFF Opportunity Presentation	From Your UFF Opportunity Presentation Appointments	2 Personal Sales per Month	2 Personal Sales per Month
Daily Activity Needed				
Complete 6 Prospecting Calls	Minimum of 3 Prospects	2 Personal MMA Sales	10 Base Shop Agents	15 Base Shop Agents
Personally Speak to 3 Prospects	Receiving The 3		Averaging 2 Sales	Averaging 2 Sales
Send the 3 Pathway to Success Videos to 2 Prospects	Pathway to Success Videos	2-4 MMA Training Sales	Per Month	Per Month
Follow up with 2 Prospects	After Videos Are Watched	Sending Videos Leads to		
Schedule 2 GPS1 Appointments	By Your Prospects,	GPS Appointments,		
Add Contacts to Your Prospecting List	Schedule the GPS1 Appt.	Which Leads to Sales	*Estimation	*Estimation

"Committed Action is the Key to All Success"





The Pathway to Success

Memory Jogger – Build Your Prospect List



[Click Here to Download This Document](#)

The key to growth in any business is to find every possible way to add new clients and to never stop doing that. You also need to never stop increasing the number of people to work side by side with you who will also add new clients.

Every successful company around the world seeks talented people to assist them in growing the business and marketing the product and/or service. United Financial Freedom is no different. Your business will grow in direct proportion to your goals, objectives and activity that you commit to in adding clients and agents to your agency. It has been proven over and over again in the business world that the professionals approach finding people to talk to as one of their core skills that they always refine and keep in action at all times. Successful businesspeople consider it one of the main parts of their potential success to find new people to help their business grow. They are not interested in luck. They are not worried about running out of people. They ensure that this never happens. Professionals always start with a written list. Then, they make a commitment to never stop adding to the list. Their list is always growing and always active. It is a dynamic “Living List of Potential Clients and Agents.”

STEP ONE – Make a list and then make it as comprehensive as possible.

Every person you can think of. EVERY PERSON. It does not matter if you think they are a viable prospect or not. Your database is one of your most important assets. Everyone goes on the list. If they are negative, put them on your list. If you hate them, put them on your list. If they are your best friend put them on your list. If they have said “I’ll never be my own boss or work for myself!”, put them on your list. If they are 98 years old, put them on your list. If they are 18 years old, put them on your list. It’s important to do this because, as you empty your mind out on paper, it will make more room for new contacts to come to mind. When you write down your nephew, you begin to think about the circle around your nephew. All of these connections will become apparent to you as you make your list more and more comprehensive. Think about everything. Every organization you’ve ever been involved in, every group you’ve ever been a part of, everything you’ve ever done. If you do this right, you will end up having hundreds and hundreds and maybe even thousands of people.

STEP TWO – The second degree of separation.

So, step two is looking at your list and thinking about the people they know. Chances are, you will know most of them also. Think about members of your family. Who do they know? Add them to your list. Think about your friends. Who do they know? Add them to your list. Think about all the relationships in your life. Who do they know? Add them to your list. Don't worry about what you're going to do with this list yet. We will train you on what to do to be successful with UFinancial. Just keep building your list and never ever stop doing it.

STEP THREE – Constantly expand your list.

This is why we call this a dynamic "Living List of Potential Clients and Agents." It never stops growing. The most successful people in business have a goal to add at least THREE people to their list every single day. They may not prospect them, but they go on the list and you should then discover a creative way to stay in touch.

If you think about this as a core skill, you will realize it is not very hard. You meet people every day. Just add them to your list. You meet people through online social media. Add them to your list. You do business with new people. Add them to your list. You need to develop a higher level of awareness. You are going to have to pay attention to the world. You're going to be introduced to new people all the time, but without a commitment to this business concept, you will not even notice. You can easily just go through the day saying "*What people? I don't see any people.*" How hard would it be to raise your awareness and add THREE new people a day to your list? Think about it, if you did that six days a week, that is 939 new people a year. Do that for 5 years and that's 4695 people. Can you see why Professionals do not worry about running out of people to talk to? Please understand, we are NOT saying you should assault these people about UFinancial the moment you are introduced. That is a mistake and it's not good. Just add them to your list, make friends, develop a connection, and when the time is right you can help them understand what we do to help people eliminate debt.

STEP FOUR – Recruit and Meet People on Purpose

Successful people recruit, mingle, search, meet people, interact with others on purpose. It is very difficult to meet new people if you're hiding from the world. Get out there. Have some fun. Get out and join a sports group. Volunteer for a cause that is important to you. Find places and organizations where you can meet new people. Not only will you enjoy yourself, but you will also meet incredible new people. Remember, you hold the keys to transform hundreds of lives. One final note when you are building this list.... **DO NOT Prejudge People**. Just put their name down no matter what.

Building Your List

Use These Topics to Help You Adding Names to Your List

WHO SOLD ME MY:

- Appliances
- Car/Tires
- Clothes
- Furniture
- House
- TV/Stereo
- Art Instructor
- Fashion Model
- Lab Technician
- Music Teacher
- Office Manager
- Mechanic
- Lawyer
- Masseuse
- Pharmacist
- Chiropractor
- Podiatrist
- Realtor
- Contractor
- Landlord
- Pastor
- Hairstylist
- Veterinarian
- Doctor
- Dentist
- Medical Receptionist
- Teacher
- Professor
- Bank Teller
- Day Care Manager
- Newlywed
- Next Door Neighbor
- Teaches My Kids
- Bowling Partner
- Was My Teacher
- Cuts My Grass
- Owns My Apartment
- Is in My Book Club
- Hung My Wallpaper
- Is my Barber
- Is my Hairdresser
- Was my Best Man
- Is my Former Boss
- Repaired My TV
- Painted My House
- Is in Rotary, Lions
- Dry Cleans My Clothes
- Sells Me Gasoline
- Teaches Me Golf
- Works With Me

I KNOW SOMEONE

WHO IS A:

- Bank Teller
- Carpenter
- Chiropractor
- Dietitian
- Electrician
- Notary Public
- Contractor
- Editor
- Printer
- Realtor
- Secretary
- Surgeon
- Antique Dealer

WHO DO YOU KNOW?

- Who is your Insurance Agent?
- Who did you buy your car from?
- Who do you buy your clothes from?
- Who sold you your house?
- Who do you buy your airline tickets from?
- Who is your doctor?
- Who does your taxes?
- Who is your Dentist?
- Who is dissatisfied?
- Who is money motivated?
- Who is out of work?
- Family members
- Who is laid off?
- Who is in MLM?
- Who has lots of time?
- Who is your doctor?
- Who reads self-help books?
- Your parents' friends

- Who does your taxes?
- Works in your bank?
- Who is the boss in your bank?
- Who are your friends?
- Who did you go to school with?
- Who gave you a business card?
- Who wants freedom?
- Who is successful?
- Who is your dentist?
- Who works with kids?
- Who do you look up to?
- Who cuts your hair?
- Who teaches?
- Who likes to dance?
- Who wants a vacation?
- Who Attends church?
- Who is in sales?
- Who needs a new car?
- Your neighbors
- Who is your boss?
- Who is self-motivated?
- Works in restaurants?
- On your wedding list?
- Who you like the least?
- Who is disabled?
- Who wants a promotion?
- Who sold you your car?
- Who likes team sports?
- Works on computers?
- You met on a plane?
- Who have you helped?
- Who builds web sites?
- Got a new computer?
- Who likes to garden?
- Who you met at a party?

- Who likes to help people?
- Who your friends know?
- Who watches TV often?
- Who likes the internet?
- Who delivers your mail?
- Works at the grocery?
- Who owns a small business?
- Who is in college?
- Who has a boat?
- Who will help you?
- Who repairs your house?
- Works w/fundraisers?
- Who will help you?
- Who likes to shop?
- Who calls you at home?
- Who recycles?
- Who needs a web site?
- Who likes to talk on the phone?
- Who bought a new home?
- Who bought a new car?
- High energy people
- Who needs extra cash?
- Who works part time?
- Who works nights?
- Who needs more time?
- Who is a social worker?

Different Professions

- Accountants
- Attorneys
- Bankers
- Builders
- Car Salesman
- Coaches

- Communication Workers
- Construction workers
- Dancers
- Electrical workers
- Engineers
- Fireman
- Flooring Sales
- Jewelers
- Karate Instructors
- Legal Assistants
- Life Insurance Sales
- Machine Shop workers
- Retail Salesclerks

RELATIVES

- Parents
- Grandparents
- Sister
- Brother
- Aunt
- Uncle
- Cousin

WHO IS MY:

- Milkman
- Mailman
- Paperboy (Parents)
- Dentist
- Physician
- Minister
- Insurance Agent
- Accountant
- Congressman
- Pharmacist
- Veterinarian
- Optometrist
- Lawyer
- Florist

- Unhappy with income!

WHO SOLD ME MY:

- House Car/Tires
- T.V./Stereo
- Fishing License
- Hunting License
- Wedding Rings Business
- Clothes
- Appliances
- Glasses/Contacts
- Vacuum Cleaner
- Boat
- Camper
- Furniture
- Office Equipment
- Librarian
- Real Estate Agent
- Interior Decorator
- Lifeguard
- Fisherman
- Waitress
- Notary Public
- Antique Dealer
- Contractor
- Chiropractor
- Electrician
- Motel Owner
- Dietitian
- Sells Ice Cream
- My Navy Buddy
- My Marine Buddy
- My Air Force Buddy
- My Army Buddy
- My Coast Guard Buddy

SOMEONE WHO IS A:

- Nurse
- Golf Pro
- Student
- Fashion Model
- Security Guard
- Sheriff
- Fire Chief
- Secretary
- Welder
- Music Teacher
- Art Instructor
- Seamstress
- Carpenter
- Pilot/Stewardess
- Bus Driver
- Bank Teller
- Garage Mechanic
- Editor
- Lab Technician
- Printer
- Restaurant Owner
- Office Manager
- Surgeon

SOMEONE WHO:

- Lives Next Door
- My Barber/Hairdresser
- Teaches My Kids Was my Best Man
- Was My Maid of Honor
- Repaired My TV
- Was my Photographer
- Is My Baby-sitter
- Was My Teacher
- Goes Bowling with Me
- Is my Former Boss
- Teaches Ceramics
- Who was in my Carpool?
- Cuts My Grass
- Painted My House
- Owns My Apartment
- Is in Rotary, Lions
- In My Book Club
- Dry Cleans Clothes
- Hung My Wallpaper
- Sells Me Gasoline
- Delivers Parcels

PEOPLE FROM A-Z

- Accordionists
- Accountant
- Accountants and auditors Actor
- Actors, producers, and directors
- Administrative services managers
- Administrator
- Advertising sales agents
- Advertising, marketing, promotions, public relations, and sales managers
- Advocate
- Aerospace engineers
- Agent
- Agricultural and food scientists
- Air traffic controller
- Airport Workers
- Air transportation occupations

- Aircraft and avionics equipment mechanics and service technicians
- Aircraft pilots and flight engineers
- Airman
- Alchemist
- Alderman
- Ambassador
- Analyst
- Anesthesiologist
- Animal care and service workers
- Animal trainer
- Animator
- Announcers
- Anthropologist
- Antique dealer
- Appraisers and assessors of real estate
- Arbitrator (also Arbitrator)
- Archaeologists
- Architects
- Archivists, curators, and museum technicians
- Art and design occupations
- Artists and related workers
- Assemblers and fabricators •
- Astronomers
- Athletes, coaches, umpires, and related workers
- Athletic trainers
- Audiologists
- Author
- Automotive body and related repairers
- Automotive service technicians and mechanics
- Aviator
- Background artist
- Bagger
- Bailiff
- Baker
- Balloonist
- Bank teller
- Banker
- Barber
- Barbers, cosmetologists, and other personal appearance workers
- Barista
- Bartender
- Barmaid
- Baseball players
- Basketball players
- Beautician
- Beekeeper
- Bellmaker
- Bellman
- Bill and account collectors
- Billing and posting clerks and machine operators
- Biochemists
- Biographer
- Biological scientists
- Biologist
- Bishop
- Blacksmith
- Boatbuilder
- Bodyguard
- Bond broker
- Bookbinder
- Bookkeeper
- Bookseller
- Botanist
- Boxers
- Brewer
- Bricklayer
- Brick masons, block masons, and stonemasons
- Broadcast and sound engineering technicians and radio operators
- Broker
- Builder
- Building and grounds cleaning and maintenance occupations
- Building cleaning workers
- Bus drivers
- Business analyst
- Business owner
- Businesspeople
- Butcher
- Butler
- Cab driver
- Cabinetmaker
- Caddy
- Calligrapher
- Cameraman
- Candlemaker
- Cardiologist
- Cardiovascular technicians
- Cargo and freight agents
- Carpenter
- Carpet, floor, and tile installers and finishers

- Cartoonist
- Cashier
- Cement masons, concrete finishers, segmental pavers, and terrazzo workers
- CEO (Chief Executive Officer)
- CFO (Chief Financial Officer)
- Chairman of the Board
- Chairman of the School Board
- Chamberlain
- Chancellor
- Chaplain
- Cheesemaker
- Chef
- Chefs, cooks, and food preparation workers
- Chemist
- Chess players
- Chief of Police
- Childcare workers
- Chimneysweeper
- Chiropractors
- Choreographer
- Circuit preacher
- Civil engineer
- Civil rights leaders
- Civil servant
- Claims adjusters, appraisers, examiners, and investigators
- Clarinetist
- Cleaning staff
- Clergy
- Clerk
- Climbers
- Clinical psychologists
- Clothier
- Clown
- Coach
- Coast guard
- Coin, vending, and amusement machine servicers and repairers
- Collectors
- College President
- Comedian
- Communications equipment operators
- Community and social services occupations
- Composer
- Computer and information systems managers
- Computer control programmers and operators
- Computer engineer
- Computer operators
- Computer programmer
- Computer scientists and database administrators
- Computer software engineers
- Computer support specialists and systems administrators
- Computer systems analysts
- Computer Repair
- Automated teller, and office machine repair
- Conductor (music)
- Conservation scientists and foresters
- Construction and building inspectors
- Construction equipment operators
- Construction laborers
- Construction managers
 - Construction trades and related workers
- Construction worker
- Consultant
- Controller
- Cook
- Copywriter
- Coroner
- Corporate executive officer
- Corporate leaders
- Corporate librarian
- Correctional Officer
- Correctional officers
- Correspondent
- Cosmetologist
- Counselors
- Counter and rental clerks
- Courier
- Couriers and messengers
- Court reporters
- CPA (Certified Public Accountant)
- Craftsman (also Craftswoman)
- Credit authorizers, checkers, and clerks
- Culinary cooker
- Curator
- Currier
- Custodian
- Customs Officer

- Customer service representatives
- Dancers and choreographers
- Data entry and information processing workers
- Database administrator (DBA)
- Demolitionist
- Demonstrators, product promoters, and models
- Dental assistants
- Dental hygienists
- Dentist
- Deputy (law enforcement)
- Designer
- Desktop publishers
- Detective
- Dietitians and nutritionists
- Diplomat
- Director
- Directors and producers of documentaries
- Disc jockey
- Dishwasher
- Dispatcher
- Distiller
- Diver
- Dock laborer
- Doctor
- Doctor of Chiropractic
- Doctor of Physical Therapy
- Documentalist
- Dogcatcher
- Domestic worker
- Doorman
- Drafters
- Draper
- Dressmaker
- Drill instructor
- Driver • Drummer
- Drywall installers, ceiling tile installers, and tapers
- Dyer
- Economist
- Editor
- Education administrators
- Education, training, library, and museum occupations
- Educator
- Electrical and electronic equipment mechanics, installers, and repairers
- Electrical engineer
- Electrician
- Electronic home entertainment equipment installers and repairers
- Elevator installers and repairers
- Elevator worker
- Embroiderer
- Emergency Medical Technician (EMT)
- Paramedics
- Engraver
- Entertainer
- Entertainers and performers
- Entrepreneur
- Environmental scientist
- Escape Artist
- Estate Agent
- Evangelist
- Examiner
- Executive
- Explorer
- Exterminator
- Face and body painter
- Factory worker
- Farmer
- Farmers, ranchers, and agricultural managers
- Fashion designer
- FBI Agent
- Figure skaters
- File clerks
- Film director
- Film producer
- Financial Adviser
- Financial Manager
- Financial Planner
- Financier
- Firefighting occupations
- Fire marshal
- Fire officer
- Firefighter
- Fisherman
- Fitness workers / trainers
- Flautist
- Flight attendant
- Flight engineer
- Flight instructor
- Flight technician
- Floor manager
- Floral designers
- Florist
- Flutist
- Food and beverage serving and related workers

- Food preparation and serving related occupations
- Food processing occupations
- Food service managers
- Foreman
- Football players
- Forester
- Funeral directors
- Game designers
- Game Developer
- Garbage collector
- Gardener
- Gatekeeper
- Geographer
- Geologist
- Geophysicist
- Golfers
- Government agent
- Graphic artist
- Graphic designers
- Greengrocer
- Grocer
- Groomer (horses)
- Grounds maintenance workers
- Guard
- Guide
- Guitarist
- Gunsmith
- Gymnasts
- Gynecologist
- Hairdresser
- Hazardous materials removal workers
- Headmaster/Mistress)
- Health diagnosing and treating occupations
- Health Advisor
- Health technologists and technicians
- Healthcare support occupations
- Heating, air-conditioning, and refrigeration mechanics and installers
- Heavy vehicle and mobile equipment service technicians and mechanics
- Herbalist
- Historian
- Home appliance repair
- Host (also Hostess)
- Hotel, motel, and resort desk clerks
- Hotelier
- House painter
- Housewife
- Human resources assistants,
- Human Resources Officer
- Human resources, training, and labor relations managers
- Hunter
- Hydraulic engineer
- Illusionist
- Illustrator
- Impersonator
- Importer
- Information/record clerks
- Inspectors, testers, and weighing inspectors
- Installation, maintenance, and repair occupations
- Instructor
- Instrument maker (musical)
- Insulation workers
- Insurance sales agents
- Intelligence officer
- Interior designer
- Internist • Interpreters and translators
- Interrogator
- Interviewers
- Inventor
- Investment Analysts
- Investment Banker
- Investment Broker
- Janitor
- Jewelers and precious stone and metal workers
- Jockey
- Journalist
- Judges, magistrates, and other judicial workers
- Juggler
- Laboratory worker
- Landlord/Landlady
- Landscape architects
- Landscaper
- Law enforcement agent
- Lawyer
- Lecturer
- Legal occupations
- Librarian
- Library assistants, clerical
- Licensed practical nurse
- Licensed vocational nurses
- Life Coach

- Life scientists
- Lifeguard
- Linguists
- Loan officer
- Lobbyist
- Locksmith
- Lodging managers
- Lumberjack
- Machine setters, operators, and tenders—metal and plastic
- Magician
- Magistrate
- Maid
- Mailman or Mail carrier
- Maintenance and repair workers, general
- Make-up artist
- Manager
- Manicurist (also Manicure)
- Manufacturer
- Marine
- Marketing Director
- Marketing Manager
- Marksman
- Martial artist
- Martial Arts Instructor
- Mason
- Massage therapists
- Masseur (also Masseur)
- Mathematician
- Mechanic
- Media related occupations
- Medic
- Medical and health services managers
- Medical assistants
- Medical records and health information technicians
- Meeting and convention planners
- Messenger
- Metal workers and plastic workers •
- Meteorologist
- Meter readers, utilities
- Midwife
- Military Leader
- Miner
- Minister
- Missionary
- Model
- Mortician
- Motor vehicle
- Movie actors
- Music Director
- Musicians, singers, and related workers
- Nanny
- Navigator
- Negotiator
- News analysts, reporters, and correspondents
- Notary
- Nun
- Nursing, psychiatric, and home health aides
- Obstetrician
- Occupational therapist
- Occupational therapist assistants and aides
- Optometrists
- Orthodontist
- Orthopedist
- Painters and paperhangers
- Paralegals and legal assistants
- Paramedic
- Park ranger
- Pastor
- Pawnbroker
- Pediatrician
- Perfumer
- Personal and home care aides
- Personal care and service occupations
- Personal Trainer
- Pest control workers
- Pharmacist
- Photographer
- Photographic process workers and processing machine operators
- Photojournalists
- Physical Therapist
- Physical therapist assistants and aides
- Physician Assistant
- Physicians and surgeons
- Physicists and astronomers
- Pianist
- Piano tuner
- Plumber
- Podiatrists
- Poet
- Police and detectives
- Police inspector
- Police officer
- Postal Service workers
- Power plant operators, and dispatchers

- Preachers
- President of the Board
- President of the School Board
- Priest
- Principal • Printer
- Printing machine operators
- Private detectives and investigators
- Probational officers and correctional treatment specialists
- Professional Athlete
- Professional Gambler
- Professional Video Game Player
- Professor
- Programmer
- Project Manager
- Property, real estate, and community association managers
- Psychiatrist
- Psychologist
- Public Relations Officer
- Public relations specialists
- Public Speaker
- Publisher
- Rabbi
- Race driver
- Radiologist
- Real estate brokers and sales agents
- Real estate developer
- Real estate investor
- Receptionists and information clerks
- Record Producer
- Recording engineer
- Recreation workers
- Recreational therapists
- Referee
- Refuse collector
- Registered nurses
- Religion scholars
- Remedial Teacher
- Repairman
- Reporter
- Researcher
- Reservation and transportation ticket agents and travel clerks
- Respiratory Therapist
- Retail salespersons
- Roofers
- Sailor
- Sales and related occupations
- Sales Representatives, wholesale and manufacturing
- Sales worker supervisors
- Salesperson (also Salesman, Saleswoman)
- Saxophonist
- School Principal
- School superintendent
- Scientist
- Screenwriter
- Sculptor
- Seamstress
- Secretaries and admin. assistants
- Secretary
- Securities, financial Services sales and commodities agents
- Security guards and gaming surveillance officers
- Sheriff
- Singer-songwriters
- Soccer players
- Social workers
- Soldier
- Songwriters • Sound technician
- Speech therapist
- Sports announcers
- Sports instructor
- Sports writers
- Steward (also Stewardess)
- Stockbroker
- Stonecutter
- Store Manager
- Street artist
- Street musician
- Street vendor
- Student
- Stunt coordinator
- Stunt double
- Stunt performer
- Surgeon
- Surveyors, cartographers, photogrammetrists, and surveying technicians
- Swimmer
- Swimming Coach
- Switchboard operator
- Tailor
- Tattoo Artist
- Taxi drivers and chauffeurs
- Taxidermist

- Teacher assistants
- Teachers—preschool, kindergarten, elementary, middle, and secondary
- Teachers—special education
- Televangelists
- Television actors
- Television presenters
- Television Producers
- Television reporters
- Television, video, and motion picture camera operators and editors
- Tellers
- Tennis players
- Therapist
- Trademark attorney
- Translator
- Travel agents
- Truck Driver
- Tutor
- Upholsterer
- Usher
- Valet
- Vehicle and mobile equipment mechanics, installers, and repairers
- Ventriloquist
- Veterinarian
- Veterinarians and veterinary surgeons
- Video-editor
- Violinist
- Waiter (also Waitress)
- Watchman
- Web designer
- Webmaster
- Wedding planner

- Welding, soldering, and brazing workers
- Window-dresser
- Wine connoisseur
- Winemaker
- Woodcarver
- Writers and editors
- X-ray technician
- Zookeeper
- Zoologist

More Topics to Help

- Friends
- Best Friend
- Family w/Child
- Family w/ Children
- In sales
- Teachers
- Twins
- In Multilevel
- Soccer league
- Works over 60 hours a week
- Little league
- PTA
- Church
- Former church
- Ambitious
- Has Whole Life
- Has Life Insurance
- Hobbies
- Bowling League
- Minister/Deacon/Priest /Rabbi
- Relatives
- Most Integrity
- Most Trustworthy
- Who you buy from
- Gas Attendant
- Doctor

- Dentist
- Chiropractor
- Shrink
- Best Smile
- Bald
- Works Nights
- Works Swing Shifts
- Church Directory
- 1st Person You See
- Single Parent
- New Baby
- Security Person
- Who You Call For Help
- Last Person You See
- Loaned you a Book
- In-Law's Friends
- Shipping/Receiving
- Salespeople
- In-Laws
- Smartest person
- Prettiest Wife
- Rides Bus/Train to Work
- Prettiest Wife
- Biggest
- Coach
- Scuba Diver
- Old Babysitter
- Nanny
- Smoker
- Quit Smoking
- Parents of Children's Friends
- College Professor
- Softball
- Recent Death
- Engineering
- Drives a truck
- In Management
- Carpenter

- Does Odd Jobs
- Works 2nd Job
- Most Successful
- Thrifty
- Recent Promotion
- Cub Scouts
- Girl Scouts
- Boy Scouts
- Most Enthusiastic
- YMCA
- Apartment Manager
- Postman
- New Car
- Best Salesperson
- Most Likeable
- Parent's Friends
- Fisherman
- Brother/Sister's Friends
- Work Out With
- Car Repair
- Tires
- Grocery Store
- Pharmacist
- Barber/Beautician
- Dry Cleaners
- Clothing Store
- Furniture
- On Crutches
- Plumber
- Electrician
- Bought Car From You
- Works in Restaurant
- Recent Accident
- Maid of Honor
- Pickup Truck
- Boss
- Best Man
- Deep Voice
- In Wedding Party
- You Vacation With
- Plays Guitar
- Red Hair & Freckles
- Drives Expensive Car
- Drives Small Car
- Beard/Moustache
- Childhood Playmate
- Auto Sales
- Day Care
- Sent you Xmas Cards
- Diet
- Spa/Health Club
- Lawyer
- Works in Factory
- Neighbors
- Former Neighborhood
- Where you Grew up
- Your Education
- School Reunion
- Spouse's Friends
- Secretary
- Parent's Neighbors
- Campfire Girls
- Just Married
- Most Attractive
- Son Married
- Daughter Married
- Aunts/Uncles/Cousins
- Parents
- Most Noble
- Best Personality
- Ski With
- Golf With
- Play Cards With
- Waitress
- Eat Out With
- Optimist
- Lions/Elks
- Church Choir
- Stereo
- Home Address Book
- Principal
- Post Office
- Tells Jokes/Stories
- Policeman
- Fireman
- In Hospital
- Nurse
- Owns Business
- Lives Your Old House
- Used to Work With
- Bartender
- Work With
- Wedding Photographer
- Swimmer
- Lifts Weights
- Sells to Your Company
- Drivers/Chauffeurs
- Talks a lot
- Football Team
- Blond Hair
- Pilot
- Bi-Lingual
- Wrestler
- Southern Accent
- Northern Accent
- East Coast
- West Coast
- Middle America

Who Do You Know In?

- Alabama
- Alaska
- Arizona
- Arkansas
- California
- Colorado
- Connecticut
- Delaware
- Florida
- Georgia

- Hawaii
- Idaho
- Illinois
- Indiana
- Iowa
- Kansas
- Kentucky
- Louisiana
- Maine
- Maryland
- Massachusetts
- Michigan
- Minnesota
- Mississippi
- Missouri
- Montana
- Nebraska
- Nevada
- New Hampshire
- New Jersey
- New Mexico
- New York
- North Carolina
- North Dakota
- Ohio
- Oklahoma
- Oregon
- Pennsylvania
- Rhode Island
- South Carolina
- South Dakota
- Tennessee
- Texas
- Utah
- Vermont
- Virginia
- Washington
- West Virginia
- Wisconsin
- Wyoming

Misc. Topics

- Antiques
- Appraisers
- Attorney
- Auto Sales
- Auto Repairing
- Advertising Rep
- Apartment Manager
- Architects
- Auditor
- Auto Parts
- Airline Employee
- Appliances
- Artist
- Auto Body Repair
- Auto Renting
- Bakers
- Bicycles
- Books
- Beauty Consultant
- Boats
- Banks
- Billiards
- Bridal
- Burials
- Caterers
- Cabinets
- Cellular
- Computers
- Copiers
- Carpet
- Childcare
- Contractor
- Crafts
- Church
- Consultants
- Dance
- Delivery
- Executive
- Electric

- Exercise
- Engineer
- Financing
- Furnace
- Fence
- Florists
- Furniture
- Fire
- Funeral
- Garage
- Gas
- Glass
- Golf
- Grocers
- Hair
- Hearing
- Hospital
- Health
- Hobby
- Hotel
- Heat
- Insurance
- Internet
- Landscape
- Laundry
- Lighting
- Limousine
- Lawn
- Loans
- Locks
- Martial Arts
- Motel
- Mail
- Management
- Mortgage
- Motorcycles
- Motor Homes





Initial Contact Script to Create Interest

If I could show you how to pay off all of your debts (mortgage, student loans, car loans, credit cards, etc.) in as little as 1/3 to 1/2 the time without refinancing or restructuring your loans and without changing your lifestyle, would you give me 20-30 minutes?

“What I am going to do is send you a couple short videos to watch. If I send these to you, will you watch them? (wait for response)..... Great, after you watch them, I will call you and we can discuss what you liked best.

I can send these to you by text or email. Which would you prefer?”

Follow up After They Watch the Videos

1. Follow up **IMMEDIATELY** after they watch the videos
2. Ask them “What did you like best?”
3. Schedule their Debt Free Savings Report Meeting

“The next step is to see what your savings numbers would be and how quickly you could be debt free?..... I have an opening tomorrow afternoon and the following morning, which is best for you?”

Response to the “Cost” Question

How much does the program cost?

“The cost is customized to your situation and how much we can save you... let’s schedule your savings report meeting (or if you have started the analysis meeting... “let’s plug your numbers in”) so we can see exactly what it will be for you.”



The Pathway to Success

Personal Accountability Tracker of Activity Process

The Accountability Tracker provides you a simple tool to ensure that as you are working with prospective clients and/or agents, that you are assured of not missing or potentially skipping any of the proven steps within the “Pathway to Success” process. As a UFF agent, it is extremely important that every potential client and/or agent is given the opportunity to receive, review and discuss the available resources and documents from United Financial Freedom that will provide them the best opportunity to make an informed decision.

After you place this simple business tool into action within your daily UFinancial activity, you will be able to quickly see the exact point of action you are on with each and every prospective client and/or agent.

Business Steps that you will be able to track

1. Approaching a prospect with the UFF business or program
2. Sending the proper resources and information to your prospects
3. Follow up calls or 3-way calls to determine the next step
4. Scheduling GPS Analysis Meetings
5. Enrolling Client and/or Agent
6. Asking for Referrals
7. Additional Notes



The download button above will provide you a fillable PDF copy of this powerful business tool.

SELF ACCOUNTABILITY TRACKER <i>"Activity Breeds Results"</i>			Phase 1 THE APPROACH					Phase 2 PRESENTATION 1			Phase 3 PRESENTATION 2 FOLLOW UP			page #: _____		
Date	Name	Phone	Approach Product	Approach Opportunity	Sem Videos Rapid Funnel	Emailed Videos	3-Way Call	Set Analysis Appt 1	Appt 1 in person	Appt 1 Online	Set Appt 2	Completed Appt 2	Enrolled Client	Enrolled Agent	Referrals	Notes
1																
2																
3																
4																
5																
6																
7																
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"Activity Breeds Results"





The Successful Steps From Initial Contact to the Analysis Appointment



The Pathway to Success

From Prospect to Client

“It is impossible to communicate face-to-face or voice to voice through a text or an email” s.c.

The first step to effective prospecting is to **personally** contact and speak with an individual, either in person, by phone or on Zoom. Then, **and only then** will the UFinancial Pathway to Success program along with our many powerful tools be effective for you and your business.

Business Tools Needed for Your UFF Prospecting

1. **Mobile Phone and Computer** – The Pathway to Success with UFinancial utilizes technology in every aspect of what we provide for all UFF agents. We also use many forms of business technology with every potential client to allow us to provide a Free Analysis for their customized Savings Report that will share with them how they can become a Money Max Account client and become debt free.
2. **Rapid Funnel App Download** – This mobile app is the business tool we use to share videos and other informational resources to all potential clients and potential UFinancial agents. Go to your app store and download the Rapid Funnel App or go to RapidFunnel.com on your computer and register there for your free account.
 - a. When you start the registration process and begin entering your account details, it will ask you for the group code. It is **ufinancial**. (case sensitive)
 - b. You will also be asked for your agent code/extension. This is the custom name you created for your UFF replicated websites (example: **UFFAgent**).
i.e. www.MoneyMaxAccount.com/UFFAgent
 - c. Create a username and password, for accessing the Rapid Funnel mobile app or the Rapid Funnel website.
 - d. **SET UP YOUR FREE ACCOUNT FIRST - Do not upgrade to the advanced version** until you have finished the basic free setup.
 - e. To upgrade to the advanced version for access to more videos, resources and functionality, log back in and go to the bottom right-hand area of the screen and click on “More”. Then go to “settings”, then “billing” to upgrade. (\$10/month)

- f. After you setup your Rapid Funnel account, go to the next item below and watch the tutorial video.

3. **Rapid Funnel Tutorial** – This is a detailed training tutorial of the Rapid Funnel program that is referred to in module #6 of the Getting Started Training Video Series mentioned in item 8a in the previous section.
 - a. To begin...Go and watch the video “**Rapid Funnel Tutorial by Steve Croft**”, which is a screen shot by screen shot training of how to use the Rapid Funnel app on your mobile phone. [Click Here to Watch Tutorial](#). As you watch this tutorial, you will see that the examples used for sending are with the text option. The same steps can be used for the “Email” option when sending videos or other resources. Either way, you will have tremendous success by using the Rapid Funnel App. Just follow each step in the tutorial and utilize the “email” option for sending videos or other resources in the same manner as explained for sending with a “text.”
 - b. This tutorial is designed for those who use a mobile phone for Rapid Funnel, If you are only using your computer for accessing Rapid Funnel, all resources mentioned in this manual are also available, and will be sent through the Rapid Funnel email service. However, this does not allow you to have a copy of the email in your “sent” record like you have in your normal email program when using your mobile device, so we strongly recommend using the mobile version which is how Rapid Funnel was originally designed for sending and communicating with prospective clients and agents.

4. **Calendly Online Calendar** – This allows you to have your calendar available online for everyone to easily schedule meetings with you. **Video Tutorial** – [CLICK HERE](#)

5. **Zoom Online Meeting Room** – This provides you a **FREE** online meeting room for prospecting and selling.
 - a. Go to <https://zoom.us/>
 - b. Click on menu item in upper right-hand area of screen “**SIGN UP, IT’S FREE**” (it is in a big orange banner box)
 - c. This gives you unlimited 1 on 1 meetings (2 total computers online at one time in a meeting)
 - d. If you have more than two people, then your meeting has a time limit of 40 minutes
 - e. If you want to upgrade, you can have unlimited meetings with up to 100 people per meeting for \$14.99 per month (a recent discount code of **urj-zoom** might still be available for the paid version)

6. **Personal Domain Name for Your Zoom Room (OPTIONAL)** – This will allow you to have people come to your room by just typing in a domain name (i.e. DebtFreeMeeting.com)
- Domain.com has domain names for \$9.99 per year (<https://www.domain.com/#/>). Use “sitehub” coupon code for discounts if they are available for your domain.
 - Choose a domain for your room. Make it an easy name to give people (i.e. AcmeOnlineMeeting.com, if your company name is Acme Group). Choose whatever you like and then go to the “Domains” drop down and choose “Search for Your Domain” to see if what you chose is available. If it is and you register it, no one else can ever take it away from you as long as you renew it each year.
 - If you choose to do this, once you have your personal domain registered and paid for, and you also have your Zoom online meeting account registered, you can set up your new domain name to have prospects and/or your agents access your Zoom meeting room with just one click.
 - To set up the “One Click” custom domain to access your Zoom room, just write down the URL of your Zoom “Personal Room” and then login in to your “Domain.com” account and choose the “Live Chat” help option and they will set up the “Forwarding of your Domain Name” to your Zoom Personal Meeting Room. You will provide them the Zoom URL that you wrote down and they will do the rest for you. This “Live Chat” support line will do this set up for you at no cost after you purchase your custom domain name.

• UFinancial and The Power of Business Technology •
The Right Tools with the Right Person
Produces Extraordinary Results



What Do You Say – What Do You Send

Follow These Steps With Every Prospect

What Do You Say?

1. Call your potential client (or have a meeting with someone in person) and have a short conversation with the express purpose of building an initial relationship and piquing the interest of the client to want more information about eliminating their debt.

2. As your conversation moves forward, before sharing what we can do for them, **you need to have a transition phrase or message that leads to presenting the UFinancial concept, story and program.** Use a unique or shocking question or statement. A perfect lead-in to this transition is when a person asks you, “And what are you doing now?” or “What do you do?” or “What are you doing these days” ... etc. **Then you transition...**
 - a. “Let me ask you a crazy question...”
 - b. “I am interested in getting your response to a very unusual question...”
 - c. “How has the current economy changed the way you handle your finances?”
 - d. “What is your Debt Free Date?”
 - e. “Do you own a home?”
 - i. “When will you have your mortgage paid off?”
 - ii. “What would it mean to you if that timeframe was reduced by 1/3 to 1/2?”
 - f. “What would you do if all of your debts were completely paid off?”
 - g. “How many people do you know that have monthly debt?”
 - h. “How many people do you know that would like to eliminate all of their debt?”

Ask any transition question or statement that piques their interest in a way that they in turn ask you a question or they are ready to hear more. At this point you are ready to move into the UFinancial Message.

3. **After the Transition** – You have many options of what you can say at this point to keep the conversation going, or you can go directly to the “Debt Free Question” listed in item #4 below. One option is to lead into the “Debt Free Question” by taking time to share your story about how the Money Max Account (MMA) helped you... or share a testimonial about one of your clients... or one from your trainer or one from one of their clients. This is not a lengthy conversation. You do not want to spend too much time with stories or info, this is the “INTEREST” phase and you want to capture their interest and then move on to the next step within the “Pathway to Success” program. Now is the time in the conversation to begin to create within your prospect their own personal interest in eliminating debt and having a Digital Financial Advisor for the rest of their lives by asking a few simple, yet powerful, questions. We want them to begin to see that during this phone call or personal conversation along with the entire UFinancial educational process that they can have the ability to live and enjoy the lifestyle that they truly want to live.

4. Then..... Introduce the concept of them being Debt Free.

a. “If I could show you how to pay off all of your debts (mortgage, student loans, car loans, credit cards, etc.) in as little as 1/3 to 1/2 the normal time without refinancing or restructuring your loans and without changing your budget or lifestyle, would you give me 20-30 minutes and watch a couple videos?”

b. After they respond with a “yes”, confirm the sending of the videos.

i. “What I am going to do is send you a couple short videos to watch. If I send these to you, will you watch them?”

c. After they confirm with you that they will watch them, explain what will happen.

i. "Great, after you watch them, I will get back with you and discuss what you liked best. I will send these to you by email. Let me make sure that I have your correct email address."

ii. *****NOTE***** You can either provide an exact time to call them back (i.e. I will call you back this afternoon at 2:00 PM), or since Rapid Funnel notifies you as soon as they have watched the videos, you can tell them that you will contact them as soon as they have finished watching the videos.

d. You will then use the Rapid Funnel App that you just installed on your phone from the directions in the previous section on "Business Tools" to send them a series of videos to watch. If you have not installed Rapid Funnel on your mobile device yet, go back a few pages to the previous section on "Business Tools" and complete that process. The next section will walk you through which videos to send using the Rapid Funnel mobile app.

e. For a copy of the above scripts: [Click Here](#)

What Do You Send?

1. The UFinancial Videos that are programmed into the Rapid Funnel mobile app provide a professional overview of the Money Management and Debt Elimination concept, how it works with all types of debts and incomes as well as the ease of using the program without the need to be a financial expert.
2. After watching the Rapid Funnel tutorial video, you are ready to begin sending videos to your prospects.

3. The Pathway to Success program is a simple and proven process of generating interest with prospective clients and agents. This section of the program comprises sending three specific videos to every prospect in one text or email, which will present the basic concepts that you discussed with them in your phone conversation (or in person) in a clear and informative format. Yes, there are many videos in the Rapid Funnel mobile app, but as you begin... **use these three videos**. These videos have been tested and proven to produce the highest levels of performance and scheduling results for you as well as helping countless individuals to see the real possibility of becoming Debt Free.

4. Here are the three videos that you will send by using the Rapid Funnel Mobile App.
 - a. **Jane and Katie – Debt Elimination Overview** – This video is located in the “Potential Clients” section of Rapid Funnel in the “Pique Interest” folder. This is a 2 minute and 20 second video that provides a short, yet powerful overview of the debt elimination concept.
 - b. **The Financial Pathway From Debt to Wealth** – This video is located in the “Potential Clients” section of Rapid Funnel in the “Follow Up” folder. This is a 9 minute and 59 second video that uses a “Story Telling” format to provide a complete overview of how the Money Max Account uses powerful mathematical strategies that have been used by the banking industry for years to allow anyone to eliminate any type of debt in a fraction of the normal time.
 - c. **Debt Elimination Program Demonstration** – This video is located in the “Potential Clients” section of Rapid Funnel in the “Follow Up” folder. This is a 25 minute and 46 second video that walks through a detailed, yet easy to follow demonstration of the Money Max Account. The video uses real life financial situations that everyone encounters and how “informed” decisions, can provide benefits of tremendous savings in money and time and allow a person to live the lifestyle that they truly want to live.

5. When sending these through Rapid Funnel, you want your text or email to be professional to reflect the proper image of your business and UFF. You are able to use a text or email option for delivering the videos to your prospective client. As you saw during the Rapid Funnel Tutorial (if you have not watched the tutorial yet, [Click Here](#)), the Rapid Funnel mobile app will allow you to enter a custom message before the video links that are populated into your text to email after you choose the three Pathway to Success videos to send. **See the CHAPTER RESOURCES Section at the end of this chapter for the email and text templates that you can download and then copy and paste into your Rapid Funnel email or text.**
6. After you send the text or email with the three customized video links generated by Rapid Funnel to your prospect, if you do not see any viewing activity within 30 minutes or have not received any notifications from Rapid Funnel about that prospect within that timeframe, it is possible that they have not seen the email or text. It is also possible that the email went into their spam or junk folder or the text got lost in their many texts they have received. If this occurs, you need to send them a quick text to confirm that they have successfully received the email or text and were able to open and view the videos. **The CHAPTER RESOURCES Section has a template of the follow up text to send.**
7. If they reply that they have not received the email or text, reply back in a text that you are calling them. Call them immediately and walk them through searching for the email in their spam or junk folder as well as searching through their text list. This does two things. First, it shows them that you care and second, you have made another personal contact (or process impression) which creates a stronger relationship. After you find the email or text, have them click on “Jane and Katie” and tell them to go ahead and watch the video as it is only two minutes long and that you will wait. Then tell them to watch the other two and that you will call them back in 45 minutes to see what they liked best.

8. When you call back – Ask them **“What did you like best?”** and whatever they say, compliment them and say many of your clients recognized and noted the same point. Let them talk a little and then tell them, ***“I can see from your comments that you are interested in seeing more about eliminating your debt. The next step is to see what your savings numbers would be and how quickly you could be debt free. Let’s look at our calendars and schedule a time for your Free Customized Savings Report, I have an opening tomorrow afternoon and the following morning, which would be best for you?”***
9. You can contact your Certified Field Trainer to verify what days and times are available for you to schedule the Free Savings Report Appointment (we call this GPS1) or many of the trainers use an online scheduling program to allow you to easily see what is available for you to schedule your prospect’s GPS1 appointment.
10. Once the GPS1 appointment is scheduled, you (or your CFT) will send the prospect a personalized email confirming the date and time of the appointment, the Zoom details along with the “Debt Free Analysis Worksheet” ([Click Here](#) to download the worksheet). **Never...Never...Never** send the worksheet to a prospective client until **AFTER** the GPS1 appointment is secured and on everyone’s calendar. If you send it before the GPS1 appointment is set, the prospect can possibly use that as an excuse to not schedule the appointment until they have time to completely fill it out. **The CHAPTER RESOURCES Section has a template of this email for you to download and then copy and paste into your email program to send to your prospect.**
11. After you send the GPS1 appointment confirmation email to your prospect, send a text 30 minutes later to confirm that they received the email and the worksheet. **The CHAPTER RESOURCES Section has a template of the follow up text to send.**

12. Send the prospect a reminder text of the GPS1 meeting 30 minutes before the meeting.
The CHAPTER RESOURCES Section has a template of the GPS1/2 meeting reminder text to send to your prospect.

13. As a new agent, as well as when you become a trainer, we recommend a pre-meeting and post-meeting briefing. When working with your Certified Field Trainer, schedule to meet 15 minutes before the prospect arrives, to discuss the prospect and the process that has brought them to the GPS1 analysis meeting. Also, this is the time to practice how to introduce your trainer to your prospect and your prospect to your trainer. This is also the time to discuss what areas within the GPS1 meeting that you need to focus on and take notes. *You should watch for at least three items that you really liked during the GPS1 meeting and then at least three items that you would like clarification on and explanation of that occurred during the GPS1 meeting. The final item should be an idea or possible suggestion of what you would have done differently if you had been at the helm of the GPS1.* We can all learn from each other. There are always teaching points and discussion items that allow the GPS1 meeting to be very productive. Then the 15 minutes after the meeting is dedicated to teaching and education for the you as the new agent as you discuss the items that you wrote down during the GPS1 appointment.

14. At the end of the GPS1 meeting, the GPS2 appointment is scheduled to review the custom analysis results. You will inform the prospect that they will be receiving an email with the details of the next meeting along with a video that will prepare them for that meeting. You want them to confirm that they will watch the video. Let them know that they will truly enjoy the video as it will provide a complete overview of what has been discussed to this point, and what will be shared when you present the analysis results. Once the GPS2 appointment is scheduled, you (or your CFT) will send the prospect an email confirming the date and time of the appointment, the Zoom details and the video.

Go to the CHAPTER RESOURCES Section for a template of this email for you to download and then copy and paste into your email to send to your prospect.

15. Send the prospect a reminder text of the GPS2 meeting 30 minutes before the meeting.

The CHAPTER RESOURCES Section has a template of the GPS1/2 meeting reminder text.

16. Once again, we recommend that you have a pre and post briefing meeting with your Certified Field Trainer (CFT) for the GPS2 Appointment.

17. If you decide to have a GPS3 meeting, follow the same process for planning and communication as you did with GPS1 and GPS2.

18. When your prospect purchases the Money Max Account at the end of your GPS process, you will schedule their Personal Client Coaching Session for them. This is an immensely powerful part of the Money Max Account acquisition process. Once they have purchased the program, they need to get started properly and have it set up to match their analysis results, their personal financial picture, and their lifestyle. For the overview, education and guidance on what to send to your new client pertaining to their coaching session along with the instructional document to download and send to your client, **Go to the Chapter** within this manual titled ***“The Pathway to Success – The Client Coaching Session”***.





The Successful Steps From Initial Contact to the Analysis Appointment

▶ Chapter Resources ◀





Initial Contact Script to Create Interest

If I could show you how to pay off all of your debts (mortgage, student loans, car loans, credit cards, etc.) in as little as 1/3 to 1/2 the time without refinancing or restructuring your loans and without changing your lifestyle, would you give me 20-30 minutes?

“What I am going to do is send you a couple short videos to watch. If I send these to you, will you watch them? (wait for response)..... Great, after you watch them, I will call you and we can discuss what you liked best.

I can send these to you by text or email. Which would you prefer?”

Follow up After They Watch the Videos

1. Follow up **IMMEDIATELY** after they watch the videos
2. Ask them “What did you like best?”
3. Schedule their Debt Free Savings Report Meeting

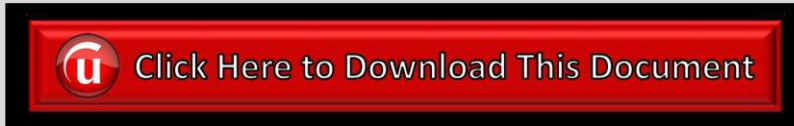
“The next step is to see what your savings numbers would be and how quickly you could be debt free?..... I have an opening tomorrow afternoon and the following morning, which is best for you?”

Response to the “Cost” Question

How much does the program cost?

“The cost is customized to your situation and how much we can save you... let’s schedule your savings report meeting (or if you have started the analysis meeting... “let’s plug your numbers in”) so we can see exactly what it will be for you.”

Email and Text Template for Sending Rapid Funnel Videos From Your Mobile Phone



To: Prospect

From: UFF Agent

Subject: XXXXX, here are the videos that we discussed

Hi XXXXX,

It was a pleasure speaking with you today. As we discussed on the phone, the Money Max Account is an Ernst & Young award winning program that can assist you in eliminating all of your debt (including mortgages, credit cards, student loans, auto loans, etc.) in as little as 1/3 to 1/2 the normal time without any change in your budget, or lifestyle along with being your digital financial advisor for the rest of your life.

I am sending you a couple short videos to let you see how this can work for you as well as the impact you are able to have sharing this with others. I will touch base with you to see what you liked best after you watch the videos.

Below are the video links:

Jane and Katie - Debt Elimination Overview:

<https://XXXXXXXXXX>

The Financial Pathway From Debt to Wealth:

<https://XXXXXXXXXX>

Debt Elimination Program Demonstration:

<https://XXXXXXX>

Best Regards,



Text Messages to Use During the Rapid Funnel Process



[Click Here to Download This Document](#)

Text Follow Up After Sending Rapid Funnel Email

(Send about 30 minutes after email is sent)

Hello XXXXX,

I just sent you an email with the videos we discussed on the phone. I want to be sure that it arrived successfully and also, that you are able to view the videos.

If you have not received the email yet, please check your spam or junk email folder, since this is the first email you are receiving from me with these videos.

Please text me back that either everything arrived or did not arrive properly.

Best Regards,

XXXX

UFF Agent Name

Mobile: XXX-XXX-XXXX

Text Follow Up After Sending Rapid Funnel Text

(Send about 30 minutes after text is sent)

Hello XXXXX,

I just sent you a text with the videos we discussed on the phone. I want to be sure that it arrived successfully and that you are able to view the videos.

If you have not received the text yet, please let me know and I will double check that it was sent to the correct phone number.

Best Regards,

XXXX

UFF Agent Name

Mobile: XXX-XXX-XXXX



Email to Send After Scheduling a GPS1 Appointment



Click Here to Download This Document

To: Prospect

From: UFF Agent

Subject: Debt Free Analysis Info for our Meeting and Discussion on Thursday the 30th

****NOTE**** You need to attach the “**Debt Free Analysis Worksheet**” to the email
(To download the worksheet, [CLICK HERE](#))

Hi XXXXX,

I am excited to have you scheduled for your Debt Free Analysis with the Money Max Account for your personal Debt Elimination program. **I am attaching a short one-page worksheet** to assist us in precisely seeing the positive impact the program can have for you. This is designed to either easily fill out on your computer and then print it out or you can print it out first and then fill it out by hand. Be very specific in the numbers (current balance, interest rate, etc.) for the mortgage, loans, revolving credit (credit cards) and income so that we can customize the savings report for you. **You don't need to send this to me, just have it with you during our meeting so we can input the correct numbers.**

In the last section (Monthly Expenses, Discretionary Income), the easiest way to complete this section is to determine an average amount of discretionary money that you have left over after the month is complete (no need to list every expense). This means after your bills, day to day expenses, fun, entertainment, etc. Of course, this number will change each month due to “life” situations, so just determine an average per month for our meeting.

I look forward to our meeting with you on Thursday the 30th at 3:30 PM Eastern Time (2:30 PM Central Time) and allowing you to develop your financial snapshot so that we can determine your calculated debt free date and the savings this will provide for you.

We will be using Zoom for our online meeting. The login info is below.

Topic: Money Max Account Debt Free Analysis

Date and Time: Thursday July 30, 2020 – 3:30 PM ET (2:30 PM CT)

Join Zoom Meeting: <https://YourCustomZoomRoomDomainName.com>

Password: XXXXXXXX

Phone in option for audio instead of using computer sound: (222) 333-4444

Meeting ID when calling in on the phone: XXX-XXX-XXXX

Best Regards,





Analysis Appointment

Name - _____ Phone # - _____

Address - _____ Email - _____

Mortgages

Lender Name	Mortgage Start Date	Mortgage Term	Monthly Payment*	Extra Principle Payment	Interest Rate	Escrow Payment	Mortgage Insurance Payment	Current Mortgage Balance	Original Mortgage Amount

**Including Principle, Interest, Escrows, PMI/Mortgage Insurance etc.*

Loans

Account Name*	Loan Start Date	Loan Term	Monthly Payment	Extra Principle Payment	Interest Rate	Current Loan Balance	Original Loan Amount

**Auto Loans, Student Loans, Personal Loans, Business Loans*

Revolving Credit

Type of Credit*	Current Balance	Minimum Payment	Extra Principle Payment	Interest Rate	Credit Limit

**LOC- Line of Credit, Credit Card, HELOC – Home Equity Line of Credit*

Average Household Net Income

Income Source*	Payment Frequency*	Average Net Income Per Paycheck

**Every Week, Every Other Week, Once a Month, Twice a Month, Every Three Months, Twice a Year, Once a Year*

Monthly Expenses (All Bills--Food, Gas, Electric etc...)- _____

AND / OR

Monthly Discretionary Income (left after Bills are paid)- _____

Text Messages to Use During the Prospecting and GPS Process



Click Here to Download This Document

Text Follow Up After Sending GPS Email Invite (Send about 30 minutes after email is sent)

Hello XXXXX,

I just sent you an email with the details of our meeting on XXXXXX along with a short document for you to gather the info we need for your Debt Free Savings Report.

If you have not received the email yet, please check your spam or junk email folder, since this is the first email you are receiving from me.

I look forward to meeting you.

Best Regards,

XXXX

UFF Agent Name

Mobile: XXX-XXX-XXXX

Text Reminder to Send Prospect 30 Minutes Before Your Scheduled GPS Appt.

Hello XXXXX,

A quick reminder of our online Zoom meeting in 30 minutes.

<http://YourCustomZoomRoomDomainName.com>

Password: XXXXX

If you would like to use audio through your phone instead of the computer.

Dial XXX-XXX-XXXX

Zoom ID: XXX-XXX-XXXX

See you online shortly,

Best Regards,

XXXX

UFF Agent Name

Mobile: XXX-XXX-XXXX



Email to Send Between GPS1 and GPS2 Appointment to Prepare for GPS2



Click Here to Download This Document

To: Prospect
From: UFF Agent

Subject: Debt Free Analysis Customized Savings Report Meeting, and Discussion on Thursday the 30th

Hello XXXXX,

It was great spending time with you today discussing your financial picture and the Money Max Account! I applaud you in what you have already accomplished in eliminating some of your debts along with your focus and goals in using the Money Max Account to guide you in building equity and investments for your future. You will also be ensuring for yourself a proven debt free pathway and allowing your money to work for you instead of against you in the way the banks and credit card companies have in place with their plans for you.

I hope that our meeting was productive and educational for you. Below is a video I would ask that you watch prior to our meeting. It will provide another overview of the program and prepare you for your customized analysis results in our meeting. We will also spend some time to fine tune your numbers to provide a more accurate Debt Free Analysis for you. Let me know if you have any questions.

1. [Money Max Account Client Presentation](#) - a 28 minute video that provides the background of the founders of United Financial Freedom and the beginning of the company along with an overview of the Money Max Account and how it will work for you.

Lastly, here is the webinar info for our meeting on Thursday July 30, 2020:

Topic: Money Max Account Debt Free Analysis

Date and Time: Thursday July 30, 2020 – 3:30 PM ET (2:30 PM CT)

Join Zoom Meeting - <http://YourCustomZoomRoomDomainName.com>

Password: XXXXXXXX

Phone in option for audio instead of using computer sound: (XXX) XXX-XXXX
Meeting ID when calling in on the phone: XXX-XXX-XXXX

I look forward to sharing your results with you on Thursday.

Best Regards,





The Successful Steps From Initial Contact to the UFinancial Agent



The Pathway to Success

From Prospect to UFF Agent

“The greatest opportunity begins with you, and will grow beyond your expectations when you share it with others” s.c.

The Pathway to Success program is designed to assist all UFF Agents in successfully building their business by helping people to experience all of the benefits of being Debt Free. The program also provides the programs, guidance, and tools for UFF Agents to professionally share this tremendous business opportunity with others.

The process in the previous section detailed the proven steps to follow for the pathway starting with a prospect and moving towards a Money Max Account (MMA) client. The same initial steps apply when you are working with an individual as a potential UFinancial Agent. There are just a couple different phrases, questions, or statements to share in your conversations as well as you will be adding a couple new videos to the Three Videos that were presented in the previous section for when you are working with a potential MMA client.

Follow These Steps With Every Prospective Agent

What Do You Say?

1. Call your potential agent (or when meeting someone in person) and have a short conversation with the express purpose of building an initial relationship and piquing their interest in both the UFF business opportunity along with the power of our MMA program of eliminating debt.

2. As your conversation moves forward, before sharing what the business potential is or in any way discussing compensation, **you need to have a transition phrase or message that leads to presenting the UFinancial concept, story and program.** Use a unique or shocking question or statement. A perfect lead-in to this transition is when a person asks you, “And what are you doing now?” or “What do you do?” or “What are you doing these days”... etc. **Then you transition...**

- a. “Let me ask you a crazy question...”
- b. “I am interested in getting your response to a very unusual question...”
- c. “How has the current economy changed the way you handle your finances?”
- d. “Do you keep your options open for additional streams of income?”
- e. “Are you open to making a significant part-time income if it didn’t conflict with your full-time income?”
- f. “I work with a national company that is absolutely exploding. I am in charge of expansion and always looking for talented individuals?”
- g. “Is this your dream job, or are you open to other things?”
- h. “Do you like working in a position that helps people?”
- i. “Are you open to hearing about a business that can positively impact virtually every person in America in saving money and eliminating all of their debt?”
- j. “What is your Debt Free Date?”
- k. “Do you own a home?
 - i. “When will you have your mortgage paid off?”
 - ii. “What would it mean to you if that timeframe was reduced to 1/3 or 1/2?”
- l. “What would you do if all of your debts were completely paid off?”
- m. “How many people do you know that would like to eliminate all of their debt?”

Ask any transition question or statement that piques their interest in a way that they in turn ask you a question or they are ready to hear more. At this point you are ready to move into the UFinancial Message.

3. **After the Transition** – You have many options of what you can say at this point to keep the conversation going, or you can go directly to the “Debt Free Question” listed in item #4 below. One option is to lead into the “Debt Free Question” by taking time to share your story about how the Money Max Account (MMA) helped you... or share a testimonial about one of your clients... or share what the UFF Business has done for you. This is not a lengthy conversation. You do not want to spend too much time with stories or info, this is the “INTEREST” phase and you want to capture their interest and then move on to the next step within the “Pathway to Success” program. Now is the time in the conversation to begin to create with your prospect a personal interest in the UFF Opportunity along with the crusade of eliminating debt all across America by asking a few simple, yet powerful, questions. During this phone call or personal conversation, we want them to begin to see the tremendous UFinancial opportunity... and that they can have the ability to live and enjoy the lifestyle that they truly want to live.
4. Then..... Introduce the concept of them being Debt Free, which will display for them the massive size of the market available to share our Money Max Account program.

a. “If I could show you how to pay off all of your debts (mortgage, student loans, car loans, credit cards, etc.) in as little as 1/3 to 1/2 the normal time without refinancing or restructuring your loans and without changing your budget or lifestyle, would you give me 20-30 minutes and watch a couple videos?”

b. After they respond with a “yes”, confirm the sending of the videos.

i. “What I am going to do is send you a couple short videos to watch. If I send these to you, will you watch them?”

c. After they confirm with you that they will watch them, explain what will happen.

“Great, after you watch them, I will get back with you and discuss what you liked best. I will send these to you by email. Let me make sure that I have your correct email address”

ii. *****NOTE***** You can either provide an exact time to call them back (i.e. I will call you back this afternoon at 2:00 PM), or since Rapid Funnel notifies you as soon as they have watched the videos, you can tell them that you will contact them as soon as they have finished watching the videos.

d. You will then use the Rapid Funnel App that you just installed on your phone from the directions in the earlier section on “Business Tools” to send them a series of videos to watch. If you have not installed Rapid Funnel on your mobile device yet, go back a few pages to the section on “Business Tools” and complete that process. The next section will walk you through which videos to send using the Rapid Funnel mobile app for a prospective UFF Agent.

5. You will notice that the first three videos are the same ones that you send to a potential client when using the Rapid Funnel Mobile App. These three videos also provide a potential UFF Agent a clear picture of the powerful MMA Program that is the foundation of the UFF Business Opportunity. **In addition to these three videos**, once you follow up with your prospect, you will then be able to send some business opportunity videos. The first one provides an interview with the founders of UFinancial that will appeal to every potential UFF Agent. The others have a focused customized message to any potential UFF Agent that is currently in the financial services sector.

a. **Jane and Katie – Debt Elimination Overview** – This video is located in the “Potential Clients” section of Rapid Funnel in the “Pique Interest” folder. This is a 2 minute and 20 second video that provides a short, yet powerful overview of the debt elimination concept.

- b. **The Financial Pathway From Debt to Wealth** – This video is located in the “Potential Clients” section of Rapid Funnel in the “Follow Up” folder. This is a 9 minute and 59 second video that uses a “Story Telling” format to provide a complete overview of how the Money Max Account uses powerful mathematical strategies that have been used by the banking industry for years to allow anyone to eliminate any type of debt in a fraction of the normal time.

- c. **Debt Elimination Program Demonstration** – This video is located in the “Potential Clients” section of Rapid Funnel in the “Follow Up” folder. This is a 25 minute and 46 second video that walks through a detailed, yet easy to follow demonstration of the Money Max Account. The video uses real life financial situations that everyone encounters and how “informed’ decisions, can provide benefits of tremendous savings in money and time and allow a person to live the lifestyle that they truly want to live.

Additional Videos To Send To Prospective UFF Agents

- d. **Why UFinancial – Debt Freedom – The Great Discovery** – This video is located in the “Independent Agent” section of Rapid Funnel in the “Follow Up” folder. This is an 8 minute and 17 second video that shares a wonderful conversation with the two founders of UFinancial, John Washenko and Skyler Whitman. They provide a clear picture of why they began this company along with their passion and commitment to helping people all across America to have a better life by eliminating the burden of debt and to have a life of freedom.

e. **Financial Professionals - Industry Specific Videos** – This is a series of 5 videos with each one focusing on a specific financial sector. These are located in the “Independent Agent” section of Rapid Funnel in the “Pique Interest” folder. The videos range from 7 to 14 minutes in length. Each one is specifically designed to share a detailed message to that professional how the UFinancial program and the Money Max Account complements as well as enhances their specific financial business. The video shares numerous avenues of providing additional services to their existing clients as well as new clients. It even discusses how they can impact their entire client base and enhance each client’s financial goals and objectives. As these are designed for when you are speaking with a financial professional, you would add the video that best matches their business or profession and add that one video to the other ones listed above.

i. **CPA** – 6 minutes and 52 seconds

ii. **Insurance** – 8 minutes and 3 seconds

iii. **Mortgage** – 13 minutes and 40 seconds

iv. **Real Estate** – 9 minutes and 28 seconds

v. **Securities** – 7 minutes and 27 seconds

6. When sending these through Rapid Funnel, you want your text or email to be professional to reflect the image of your business and UFF. You are able to use a text or email option for delivering the videos to your prospective client. As you saw during the Rapid Funnel Tutorial (if you have not watched the tutorial yet, [Click Here](#)), the Rapid Funnel mobile app will allow you to enter a custom message before the video links that are populated into your text to email after you choose the three Pathway to Success videos to send. **The CHAPTER RESOURCES Section has email and text templates that you can download to be able to copy and paste into your Rapid Funnel email or text.**

7. After you send the text or email with the three customized video links generated by Rapid Funnel to your prospect along with any of the videos that focus on financial professionals, if you do not see any viewing activity within 30 minutes or have not received any notifications from Rapid Funnel about that prospect within that timeframe, it is possible that they have not seen the email or text. It is also possible that the email went into their spam or junk folder or the text got lost in their many texts they have received. If this occurs, you need to send them a quick text to confirm that they have successfully received the email or text and were able to open and view the videos. **Go to the CHAPTER RESOURCES Section for a template of the follow up text to send.**
8. If they reply that they have not received the email or text, reply with a text that you are calling them. Call them immediately and walk them through searching for the email in their spam or junk folder as well as searching their text list. This does two things. First, it shows them that you care and second, you have made another personal contact (or process impression) which creates a stronger relationship. After you find the email or text, have them click on “Jane and Katie” and tell them to go ahead and watch the video as it is only two minutes long and that you will wait. Then tell them to watch the other videos and that you will call them back in 45 minutes to see what they liked best. Even though this is a prospective agent, you still want to walk through the same process of providing them a Free Savings Report Analysis, which is the GPS System.
9. When you call back – Ask them **“What did you like best?”** and whatever they say, compliment them and say many of your clients recognized and noted the same point. Let them talk a little and then tell them, “I can see from your comments that you are interested in seeing more about eliminating your debt. The next step is to see what your savings numbers would be and how quickly you could be debt free. Let’s look at our calendars and schedule a time for your Free Customized Savings Report, I have an opening tomorrow afternoon and the following morning, which would be best for you?”

10. You can contact your Certified Field Trainer to verify what days and times are available for you to schedule the Free Savings Report Appointment (we call this GPS1) or many of the trainers use an online scheduling program to allow you to easily see what is available for you to schedule your prospect's GPS1 appointment.
11. Once the GPS1 appointment is scheduled, you (or your CFT) will send the prospect a personalized email confirming the date and time of the appointment, the Zoom details along with the "Debt Free Analysis Worksheet" ([Click Here](#) to download the worksheet). **Never...Never...Never** send the worksheet to a prospective client until **AFTER** the GPS1 appointment is secured on everyone's calendar. If you send it before the GPS1 appointment is set, the prospect can possibly use that as an excuse to not schedule the appointment until they have time to complete it. **The CHAPTER RESOURCES Section has a template of the email for you to download and then copy and paste into your email.**
12. After you send the GPS1 appointment confirmation email to your prospect, send a text 30 minutes later to confirm that they received the email and the worksheet. **The CHAPTER RESOURCES Section has a template of the follow up text to send.**
13. Send the prospect a reminder text of the GPS1 meeting 30 minutes before the meeting. **The CHAPTER RESOURCES Section has a template of the GPS1/2 meeting reminder text.**
14. As a new agent, as well as when you become a trainer, we recommend a pre-meeting and post-meeting briefing. When working with a Certified Field Trainer, schedule to meet 15 minutes before the prospect arrives, to discuss the prospect and the process that has brought them to the GPS1 analysis meeting. Also, this is the time to practice how to introduce your trainer to your prospect and your prospect to your trainer. This is also the time to discuss what areas within the GPS1 meeting that you need to focus on and take notes. ***You should watch for at least three items that you really liked during***

the GPS1 meeting and then at least three items that you would like clarification on and explanation of that occurred during the GPS1 meeting. The final item should be an idea or possible suggestion of what you would have done differently if you had been at the helm of the GPS1. We can all learn from each other. There are always teaching points and discussion items that allow the GPS1 meeting to be very productive. Then the 15 minutes after the meeting is dedicated to teaching and education for the new agent as you discuss the items that have been written down by the new agent.

15. At the end of the GPS1 meeting, the GPS2 appointment is scheduled to review the custom analysis results. You will inform the prospect that they will be receiving and email with the details of the next meeting along with a video that will prepare them for that meeting. You want them to confirm that they will watch the video. Let them know that they will enjoy the video and that it will provide a complete overview of what has been discussed to this point and also what will be shared when you present the analysis results. Once the GPS2 appointment is scheduled, you (or you CFT) will send the prospect a personalized email confirming the date and time of the appointment and the Zoom details. **The CHAPTER RESOURCES Section has a template of the email for you to download and then copy and paste into your email.**
16. Send the prospect a reminder text of the GPS2 meeting 30 minutes before the meeting. **The CHAPTER RESOURCES Section has a template of the GPS1/2 meeting reminder text to send to your prospect.**
17. Once again, we recommend that you have a pre and post briefing meeting with your Certified Field Trainer (CFT) for the GPS2.
18. If you decide to have a GPS3 meeting, follow the same process for planning and communication as you did with GPS1 and GPS2.

19. When your prospect purchases the Money Max Account at the end of your GPS process, you will schedule their Personal Client Coaching Session for them. This is an immensely powerful part of the Money Max Account acquisition process. Once they have purchased the program, they need to get started properly and have it set up to match their analysis results, their personal financial picture and their lifestyle. For the overview, education and guidance on what to send to your new client pertaining to their coaching session along with the instructional document to download and send to your client, please **Go to the Chapter** within this manual titled ***“The Pathway to Success – The Client Coaching Session”***.

20. With this being a prospective agent as well as a potential client, once they have seen all of the videos and have completed their Free Savings Report Analysis through the GPS System, they will clearly see the tremendous potential of being an agent. If you have not already invited them to or presented to them a UFF business overview, invite them to a UFinancial Business Overview webinar or present a personal overview with them and register them as a new UFF agent. From there, this manual will guide them as they start their new United Financial Freedom Career. **Go to the CHAPTER RESOURCES Section for a downloadable template of a Welcome Email for your New Agent.**





The Successful Steps From Initial Contact to the UFinancial Agent

► Chapter Resources ◀



Email and Text Template for Sending Rapid Funnel Videos From Your Mobile Phone



Click Here to Download This Document

To: Prospect

From: UFF Agent

Subject: XXXXX, here are the videos that we discussed

Hi XXXXX,

It was a pleasure speaking with you today. As we discussed on the phone, the Money Max Account is an Ernst & Young award winning program that can assist you in eliminating all of your debt (including mortgages, credit cards, student loans, auto loans, etc.) in as little as 1/3 to 1/2 the normal time without any change in your budget, or lifestyle along with being your digital financial advisor for the rest of your life.

I am sending you a couple short videos to let you see how this can work for you as well as the impact you are able to have sharing this with others. I will touch base with you to see what you liked best after you watch the videos.

Below are the video links:

Jane and Katie - Debt Elimination Overview:

<https://XXXXXXXXXX>

The Financial Pathway From Debt to Wealth:

<https://XXXXXXXXXX>

Debt Elimination Program Demonstration:

<https://XXXXXXX>

Best Regards,



Text Messages to Use During the Rapid Funnel Process



[Click Here to Download This Document](#)

Text Follow Up After Sending Rapid Funnel Email

(Send about 30 minutes after email is sent)

Hello XXXXX,

I just sent you an email with the videos we discussed on the phone. I want to be sure that it arrived successfully and also, that you are able to view the videos.

If you have not received the email yet, please check your spam or junk email folder, since this is the first email you are receiving from me with these videos.

Please text me back that either everything arrived or did not arrive properly.

Best Regards,

XXXX

UFF Agent Name

Mobile: XXX-XXX-XXXX

Text Follow Up After Sending Rapid Funnel Text

(Send about 30 minutes after text is sent)

Hello XXXXX,

I just sent you a text with the videos we discussed on the phone. I want to be sure that it arrived successfully and that you are able to view the videos.

If you have not received the text yet, please let me know and I will double check that it was sent to the correct phone number.

Best Regards,

XXXX

UFF Agent Name

Mobile: XXX-XXX-XXXX



Email to Send After Scheduling a GPS1 Appointment



Click Here to Download This Document

To: Prospect

From: UFF Agent

Subject: Debt Free Analysis Info for our Meeting and Discussion on Thursday the 30th

****NOTE**** You need to attach the “**Debt Free Analysis Worksheet**” to the email
(To download the worksheet, [CLICK HERE](#))

Hi XXXXX,

I am excited to have you scheduled for your Debt Free Analysis with the Money Max Account for your personal Debt Elimination program. **I am attaching a short one-page worksheet** to assist us in precisely seeing the positive impact the program can have for you. This is designed to either easily fill out on your computer and then print it out or you can print it out first and then fill it out by hand. Be very specific in the numbers (current balance, interest rate, etc.) for the mortgage, loans, revolving credit (credit cards) and income so that we can customize the savings report for you. **You don't need to send this to me, just have it with you during our meeting so we can input the correct numbers.**

In the last section (Monthly Expenses, Discretionary Income), the easiest way to complete this section is to determine an average amount of discretionary money that you have left over after the month is complete (no need to list every expense). This means after your bills, day to day expenses, fun, entertainment, etc. Of course, this number will change each month due to “life” situations, so just determine an average per month for our meeting.

I look forward to our meeting with you on Thursday the 30th at 3:30 PM Eastern Time (2:30 PM Central Time) and allowing you to develop your financial snapshot so that we can determine your calculated debt free date and the savings this will provide for you.

We will be using Zoom for our online meeting. The login info is below.

Topic: Money Max Account Debt Free Analysis

Date and Time: Thursday July 30, 2020 – 3:30 PM ET (2:30 PM CT)

Join Zoom Meeting: <https://YourCustomZoomRoomDomainName.com>

Password: XXXXXXXX

Phone in option for audio instead of using computer sound: (222) 333-4444

Meeting ID when calling in on the phone: XXX-XXX-XXXX

Best Regards,





Analysis Appointment

Name - _____ Phone # - _____

Address - _____ Email - _____

Mortgages

Lender Name	Mortgage Start Date	Mortgage Term	Monthly Payment*	Extra Principle Payment	Interest Rate	Escrow Payment	Mortgage Insurance Payment	Current Mortgage Balance	Original Mortgage Amount

**Including Principle, Interest, Escrows, PMI/Mortgage Insurance etc.*

Loans

Account Name*	Loan Start Date	Loan Term	Monthly Payment	Extra Principle Payment	Interest Rate	Current Loan Balance	Original Loan Amount

**Auto Loans, Student Loans, Personal Loans, Business Loans*

Revolving Credit

Type of Credit*	Current Balance	Minimum Payment	Extra Principle Payment	Interest Rate	Credit Limit

**LOC- Line of Credit, Credit Card, HELOC – Home Equity Line of Credit*

Average Household Net Income

Income Source*	Payment Frequency*	Average Net Income Per Paycheck

**Every Week, Every Other Week, Once a Month, Twice a Month, Every Three Months, Twice a Year, Once a Year*

Monthly Expenses (All Bills--Food, Gas, Electric etc...)- _____

AND / OR

Monthly Discretionary Income (left after Bills are paid)- _____

Text Messages to Use During the Prospecting and GPS Process



Click Here to Download This Document

Text Follow Up After Sending GPS Email Invite (Send about 30 minutes after email is sent)

Hello XXXXX,

I just sent you an email with the details of our meeting on XXXXXX along with a short document for you to gather the info we need for your Debt Free Savings Report.

If you have not received the email yet, please check your spam or junk email folder, since this is the first email you are receiving from me.

I look forward to meeting you.

Best Regards,

XXXX

UFF Agent Name

Mobile: XXX-XXX-XXXX

Text Reminder to Send Prospect 30 Minutes Before Your Scheduled GPS Appt.

Hello XXXXX,

A quick reminder of our online Zoom meeting in 30 minutes.

<http://YourCustomZoomRoomDomainName.com>

Password: XXXXX

To use audio through your phone instead of the computer. Dial XXX-XXX-XXXX

Zoom ID: XXX-XXX-XXXX

See you online shortly,

Best Regards,

XXXX

UFF Agent Name

Mobile: XXX-XXX-XXXX



Email to Send Between GPS1 and GPS2 Appointment to Prepare for GPS2



Click Here to Download This Document

To: Prospect
From: UFF Agent

Subject: Debt Free Analysis Customized Savings Report Meeting, and Discussion on Thursday the 30th

Hello XXXXX,

It was great spending time with you today discussing your financial picture and the Money Max Account! I applaud you in what you have already accomplished in eliminating some of your debts along with your focus and goals in using the Money Max Account to guide you in building equity and investments for your future. You will also be ensuring for yourself a proven debt free pathway and allowing your money to work for you instead of against you in the way the banks and credit card companies have in place with their plans for you.

I hope that our meeting was productive and educational for you. Below is a video I would ask that you watch prior to our meeting. It will provide another overview of the program and prepare you for your customized analysis results in our meeting. We will also spend some time to fine tune your numbers to provide a more accurate Debt Free Analysis for you. Let me know if you have any questions.

1. [Money Max Account Client Presentation](#) - a 28 minute video that provides the background of the founders of United Financial Freedom and the beginning of the company along with an overview of the Money Max Account and how it will work for you.

Lastly, here is the webinar info for our meeting on Thursday July 30, 2020:

Topic: Money Max Account Debt Free Analysis

Date and Time: Thursday July 30, 2020 – 3:30 PM ET (2:30 PM CT)

Join Zoom Meeting - <http://YourCustomZoomRoomDomainName.com>

Password: XXXXXXXX

Phone in option for audio instead of using computer sound: (XXX) XXX-XXXX
Meeting ID when calling in on the phone: XXX-XXX-XXXX

I look forward to sharing your results with you on Thursday.

Best Regards,



Welcome Email to Send to New Agent After UFF Agent Registration



Click Here to Download This Document

To: Prospect

From: UFF Agent

Subject: Welcome to UFinancial

(Note: Be sure and add the following Attachments to your email:

the Prospecting Sales Script - [Click Here](#) and the W-9 Form - [Click Here](#))



Hi XXXXX,

Congratulations and welcome to the UFinancial family. I am very excited to have you on our team. This is a tremendous company and the Money Max Account is continuing its' 16-year history of helping people from all walks of life to eliminate their debt, as well as many are also adding streams of income as agents with UFinancial (UFF). Our goal is to bring you the greatest business opportunity available in America. The \$8.5+ trillion financial industry is experiencing major changes and we are proud to say that UFF is leading the way.

We are committed to working side-by-side with you to build your agency, your business skills and the income that you desire. Your new agent program will provide the personal one-on-one and team training that you need to begin building your business. This will include field training, product and services knowledge, online and live business training classes and much more.

Here are the first few items that we want you to dive into so that we can accelerate your business.

1. **New Agent Training Program** – We have designed a video program to help every agent enhance their business immediately. These are short videos that provide exact details as to what you should be doing right now. So, no matter if you are brand new or an experienced agent, these will be very productive for you.
 - a. Go to <http://UFFPowerTeam.com> (this site provides a calendar and library of tools and online meetings that are available for you and your business)
 - b. On the top menu, click on **“Getting Started Training”**
 - c. Watch these short and powerful videos that will get you on track to fast success. It will take about one hour to watch all 9 videos (each one is between 5 and 12 minutes long)
 - d. I have attached the script that you will see during video #5 “What to Say”

- e. We want you to set aside an hour to complete these videos over the next 48 hours. You and I will have a private session to review the video series after you have successfully completed them.
2. **Rapid Funnel App Download** – Go to your app store and download the Rapid Funnel App or go to RapidFunnel.com on your computer and register there for your account.
 - a. After you setup your account, go to the next item below and watch my detailed tutorial video.
 - b. When you start entering your account details, it will ask you for the group code. It is **ufinancial**.
 - c. The agent code/extension is the custom name you created for your replicated websites (example: **UFFAgent**). www.MoneymaxAccount.com/UFFAgent
 - d. Create a username and password.
 - e. **Do not upgrade to the advanced version** until you have finished the basic free setup.
 - f. Then log back in and go to the bottom left hand area of the screen and at the bottom of the list go to “billing” to upgrade.
 3. **Rapid Funnel Tutorial** – This is a detailed training tutorial of the program that is referred to in module #6 of the Getting Started Training program
 - a. Go to <https://vimeo.com/showcase/6601503> and watch the video “**Rapid Funnel Prospecting by Steve Croft**”, which shows screen shot by screen shot of how to use the Rapid Funnel app on your mobile phone. As you watch this tutorial, you will see that the examples used for sending are with the text option. The same steps can be used for the “Email” option when sending videos or other resources. Either way, you will have tremendous success by using the Rapid Funnel App. Just follow each step in the tutorial and utilize the “email” option for sending videos or other resources in the same manner as explained for sending with a “text.”
 - b. This tutorial is designed for those who use a mobile phone for Rapid Funnel, If you are using the computer only with Rapid Funnel, call me and we will walk through it together.
 4. **Zoom Online Meeting Room** – This provides you a **FREE** online meeting room for prospecting and selling.
 - a. Go to <https://zoom.us/>
 - b. Click on menu item in upper right-hand area of screen “**SIGN UP, IT’S FREE**” (it is in a big orange banner box)
 - c. This gives you unlimited 1 on 1 meetings (2 total computers online at one time in a meeting)
 - d. If you have more than two people, then your meeting has a time limit of 40 minutes
 - e. If you want to upgrade, you can have unlimited meetings with up to 100 people per meeting for \$14.99 per month (a recent discount code of **urj-zoom** might still be available for the paid version)

5. **Personal Domain Name for Your Zoom Room** – This will allow you to have people come to your room by just typing in a domain name (i.e. DebtFreeMeeting.com)
 - a. Domain.com has domain names for \$9.99 per year (<https://www.domain.com/#/>). Use “sitehub” coupon code for discounts if they are available for your domain.
 - b. Choose a domain for your room. Make it an easy name to give people (mine is AcmeOnlineMeeting.com, since my company name is Acme Group). Choose whatever you like and then go to the “Domains” drop down and choose “Search for Your Domain” to see if what you chose is available. If it is and you register it, no one else can ever take it away from you as long as you renew it each year.
 - c. If you choose to do this. Once you have it registered and paid for, and you have your Zoom online meeting account, you can set up your new domain name to have prospects or your agents access your Zoom meeting room with just one click.
 - d. To set up the “One Click” custom domain to access your Zoom room, just write down the URL of your Zoom “Personal Room” and then login in to your “Domain.com” account and choose the “Live Chat” help option and they will set up the “Forwarding of your Domain Name” to your Zoom Personal Meeting Room. You will provide them the Zoom URL that you wrote down and they will do the rest for you. This “Live Chat” support line will do this set up for you at no cost after you purchase your custom domain name.
6. **Calendly Online Calendar** – This allows you to have your calendar available online for everyone to easily schedule meetings with you. **Video Tutorial** – [CLICK HERE](#)
7. **Team Calendar of Events and Video Training Library** – Go to <https://UFFPowerTeam.com> This site has a massive amount of assistance, live online meetings and video tutorials and trainings
8. **Your Debt Free Date Personal Analysis** - If you have not already completed this, immediately schedule your own analysis with us so that you can see how quickly you will be debt free.
9. **Your Field Training** – I will be your field trainer and will get you off to a fast start. I will assist you as you work with your initial prospects and prepare for your two training sale sessions where you will see exactly how we share the Money Max Account and help people get started on eliminating all of their debt. Remember, you actually are paid to sit and watch your training sales as you learn (\$450 on an average sale).
10. **Your United Financial Back Office** – When you registered as a UFinancial Agent, you received an email from the corporate office of United Financial Freedom that directs you to your personal back office which includes a massive amount of resources above and beyond our team resources and the getting started programs that we have mentioned above. Go to your UFF back office at: <https://portal.ufinancialfreedom.com> and login with the user name and password that you set up when you registered as an agent. In the main menu at the top, click on “**Getting Started**” and follow the items on

this page. This will provide you additional areas that have been tested and proven to accelerate your success with UFinancial. You will also see on the right-hand side of the home web page, an information box which details your agent number, custom websites, agent support and analysis hotline phone numbers along with my contact info as your sponsor. Below are a few Back Office and UFinancial Actions that you need to complete.

- a. Go to the “Commission Payment Preferences” section which is accessed in the drop-down menu under your name in the upper right-hand area of your agent back office. Update the preferences to “ACH” so that you will receive your commissions through direct deposit instead of receiving check by mail which is much slower.
- b. In the same “Drop Down Menu”, choose “Replicated Sites” and choose a customized name for your UFF websites
- c. In the same “Drop Down Menu”, ensure that you have created a secure password for your back office. If you set up a temporary password during your registration with your sponsor, choose the “Change Password” option and scroll down to the bottom section of that page and change your password to a new confidential one for accessing your UFF Back Office.
- d. Fill out the W9 form that is attached to this “Welcome Email” and email the signed and completed form to: accounting@ufinancialfreedom.com or you can fax to 801-505-0228.

11. **Stay Plugged In** – We have a tremendous network of support, training and sharing of ideas to help every agent as we all assist people all across America to **Convert their Debt to Wealth**. Take advantage of every possible opportunity to participate in both the events held locally in offices and other venues as well as the numerous online meetings and events. This will help you to learn and grow your business as well as allow others to learn from you and your experience and successes with UFinancial.

I am going to be your field trainer and get you off to a fast start. I am available for 3-way calls, online client presentations, online prospect calls or presentations, training sales and more. We will work together to help you with your business. We are here to ACCELERATE your success. We will be scheduling online training meetings and get together for agents from across America to help you and your business grow faster.

Weekly Schedule of Online Events

Below is listed the weekly online meetings for training, business overviews and the sharing of ideas. These are scheduled for two main focuses. First, to provide growth and education for you and second... to provide a professional environment for you to invite guests and prospective clients to be introduced and to learn more about the Money Max Account and the UFinancial business career opportunities. I fully understand that a person is probably not able to attend every online meeting. We host many sessions throughout the week to accommodate everyone’s busy schedule so that they are able to find a few that work into their calendar. The more activities that you plug in to... the more you and your business will grow.

Every 1st and 3rd Monday evening of each month at 8:00 PM ET - Different UFF Leaders present a National UFinancial presentation focusing on various sectors of the Financial Industry, Corporate Environments, Local and National Organizations and more. These cover areas such as Real Estate, Mortgage, Loan Officers, Insurance, Securities, Churches, Small Businesses and more, sharing the many benefits available for collaboration between UFinancial and these various Business Sectors. The Zoom room is www.TomsWebRoom.com. Invite as many guests as you like. It generally lasts about 30-35 minutes.

Every 2nd and 4th Monday evening at 8:00 PM ET – Mac Saunders of the UFinancial Corporate Team hosts a Money Max Account Client Presentation. You register for this in your UFinancial Agent Back Office. This presentation generally lasts about 45 minutes.

Every Tuesday afternoon at 2:00 PM ET – Different UFF Leaders present the National UFinancial Corporate Business Overview presentation. The Zoom room is www.TomsWebRoom.com. Invite as many guests as you would like to have attend. It generally lasts about 30-35 minutes.

Every Tuesday evening at 8:00 PM ET – The UFinancial Corporate Team hosts a National Agent Training along with providing company updates and announcements. You register for this in your UFinancial Agent Back Office. This training meeting lasts about one hour.

Every Wednesday evening at 8:00 PM ET – Tom Keener (The very first UFF Agent and our Team's Master Trainer) ... hosts a weekly national team online meeting to share ideas, national announcements, contests, recognition of individuals, and much more. The Zoom room is www.TomsWebRoom.com. This meeting is for UFF Agents only. It generally lasts one hour.

Every Thursday evening at 8:00 PM ET - Different UFF Leaders present the National UFinancial Corporate Business Overview presentation. The Zoom room is www.TomsWebRoom.com. Invite as many guests as you like. It generally lasts about 30-35 minutes.

Mornings (Mon, Tues, Thurs, Fri) at 10:00 AM ET - This is a **national round table discussion for training, product info and much more**. The Zoom room is www.TomsWebRoom.com. This is a come and go session that is packed with great information and training. It lasts about 90 minutes depending on where the conversation and participation goes.

If you have any questions as you get started with these steps, give me a call.

Once again, welcome aboard. We are all looking forward to working with you as we help you build your business and help people eliminate the burden of debt.

Best Regards,





**The Successful Steps
Process Summary
Say It - Send It - Sell It**



The Pathway to Success

The Entire Process

Say It – Send It – Sell It

“The greatest success comes about by studying a proven plan, believing in that proven plan, committing to that proven plan, following that proven plan with every ounce of effort you have and never allowing anything or anyone to pull you away from that proven plan ” s.c.

Now that you have studied the detailed steps of “**What Do I Say?**” and “**What Do I Send?**”, which you follow with every person you contact, it is time to commit to the Pathway to Success process. With every person you reach out to as you share the tremendous UFinancial story, program, and opportunity, focus on following the **proven step by step process** within this manual. This will provide you a simple and repeatable process that will ensure you the highest level of performance, productivity, and results with every person you contact.

Once you have this Pathway to Success process firmly in place within your business and then make a **personal commitment to follow it every time**, whether it be with a prospective MMA client or a prospective UFF agent, you will achieve and then exceed every goal and objective you have with your UFinancial business.

On the following three pages, we will present a simplified step by step summary of the entire process that has been detailed up to this point, so that you will always be able to see what the next step is as you share the United Financial Freedom business and programs.

The Pathway to Success

The Entire Process

Say It – Send It – Sell It

1. **Your List** - Build your list using the “Memory Jogger” along with all of the databases and contact lists you have created in your business and personal life.
2. **Initial Contact** - Use as many tools and resources available (LinkedIn, Facebook, Text, Network organizations, etc.) to initially reach out to your prospects with the “ultimate goal” of having a personal conversation with them in person, on the phone or by Zoom.
3. **First Meeting** - Have a personal meeting either in person, on the phone or with Zoom.
4. **Build a Relationship** - Use the personal meeting to begin to develop a relationship and to learn more about them and for them to know more about you.
5. **Create Interest in Debt Elimination** - Begin to ask questions that will “Pique Their Interest” in Debt Elimination by using a transitional phrase or question (i.e. “Let me ask you a crazy question”)
6. **The Question** - Use the UFinancial script to ask the question, “If I could show you....”
7. **Videos** - Offer to send them some short videos
8. **Confirmation to View the Videos** - Confirm that if you send them, they will watch them. Then, let them know you will follow up after they finish viewing the videos to see “what they liked best”.
9. **Send them the three “Pathway to Success” videos** - Text or email using Rapid Funnel
 - a. Jane and Katie – Debt Elimination Overview
 - b. The Financial Pathway From Debt to Wealth
 - c. Debt Elimination Program Demonstration

10. **Follow Up Text** - Send a text to them after the Rapid Funnel email or text has been sent to verify that it arrived successfully and that they are able to view the videos.
11. **If they did not receive the videos**, call them and help them find the email or text and then have them watch the Jane and Katie video while you are on the phone with them.
12. **Follow Up Phone Call** - Call back and follow up as soon as Rapid Funnel notifies you that they have viewed the videos and ask them “What did you like best?”
13. **GPS Appointment** - After you discuss what they liked best, follow the script to schedule their appointment for their Free Savings Report Analysis (the GPS Selling System).
14. **Confirm Appointment with CFT** - Confirm the dates with your Certified Field Trainer.
15. **Send Email Confirmation to Prospect** - After the GPS appointment is scheduled, (either you or your CFT) send a confirmation email to the prospect with the date, time, Zoom information, etc. along with the “Analysis Worksheet”
16. **Send a confirmation text for the GPS1 meeting** – Send this 30 minutes before the meeting begins. If the appointment was scheduled many days in advance send one 24 hours ahead and then another 30 minutes ahead. A phone call is also an excellent option to ensure that the worksheet has been completed and the time is still confirmed.
17. **Pre and Post Appointment Training Session** – We recommend that you schedule a 15-minute pre and post GPS appointment with your Certified Field Trainer to prepare for the GPS meeting and then to have a review afterwards for detailed training.
18. **Schedule GPS2 appointment** - At the end of the GPS1 appointment, schedule the GPS2 appointment and inform the prospect that they will receive an email and a video so that they will be prepared for the 2nd appointment when the analysis results are presented.
19. **At the end of the GPS2 appointment** - Schedule a GPS3 appointment if needed. If not, and the prospect purchases the Money Max Account, congratulate them, schedule their Personal Client Coaching Session. **Go to the Chapter** within this manual titled “*The Pathway to Success – The Client Coaching Session*” for email and document template.

20. Register as a UFinancial Agent - If they also register as a new UFF agent, send them a welcome email and schedule an “Onboarding Meeting” to present and walk through this New Agent Manual. See below for the steps to register your new UFinancial Agent.

Registering Your New UFinancial Agent That You Recruited

- 1. Follow the Pathway to Success Steps** - Follow the same steps listed above that have been provided for every prospective client or UFF agent to allow your prospect to clearly see the UFinancial Business Opportunity.
- 2. Register New Agent** - To register a prospect as a UFF agent, you either direct them to your Personal UFF Opportunity website (<https://UFFOpportunity.com/YourPersonalURL>) and give them directions on the simple registration process, or you can access your UFF opportunity site yourself and complete the registration process with them.
- 3. Welcome new UFF Agent** - Once they are registered and have a UFF agent number, welcome them to the UFF family and let them know that you will be sending them a welcome email with the first steps of getting started.
- 4. Onboarding Appointment** - Schedule their “Onboarding Meeting” within the first 24 hours and send them their welcome letter. **Go to the “New Agent Manual Resource Center” for a downloadable template of a Welcome Email for your New Agent.**
- 5. New Agent Manual** - The “Onboarding Meeting” will be focused on presenting and walking through this “New Agent Manual” and to set their goals and objectives for the first 30-60-90 days to help them to get off to a fast start.





The Client Coaching Session





The Pathway to Success

The Client Coaching Session – Best Practices

Why is coaching important?

It is not about the sale for you or UFF. The personal coaching session is all about the new client with United Financial Freedom. This teaches them how to get started on the pathway of eliminating all of their debt and learning how to use the MMA as their Digital Financial Advisor for the rest of their life.

UFF Agents and Corporate Coaches are partners...equally educating the client on the MMA program.

It's extremely important that you, as the UFF Agent, present a live and engaging demonstration of the MMA program and how it works, so that the client sees the power and the ease of use of this award winning program.

Client Success = Company Success = Our Success

After the client purchases their MMA program, there is another very important step that needs to be accomplished... scheduling their personal 90-minute coaching session so that this is confirmed on their calendar. It is very easy to schedule this.

Once you finish the sales process and create their username and password, the next screen that is displayed is the coaching session scheduling page.

Select a date on the left, and the times available will pop up on the right.

Once you have the client scheduled for their personal coaching session, add this to your calendar as well, so that you can touch base afterwards to see what they liked best about their session and to see if they have any questions. If they have a lot of MMA “functionality” questions, encourage them to schedule another coaching session.

On the next page, we will walk through the steps that the new client will be able to follow to ensure that their coaching session is as productive as possible. You will be able to download that document and send it to your new client as an email attachment along with the [email template](#) in the **CHAPTER RESOURCES** Section congratulating them on their new Money Max Account so they can be fully prepared for their coaching session.



The Money Max Account

The Client Coaching Session – Preparation Steps



On behalf of United Financial Freedom, we congratulate you on registering for your new Money Max Account and are looking forward to your personal coaching session. Our goal is to provide you a learning session that will allow your program to be fully customized to match your goals and objectives for now and the future.

Since we have a full 90 minutes that we will be spending together, we want to respect your time and to be as productive as possible. To prepare for our time together, we have a few items that we ask for you to complete prior to our scheduled session so we are able to use every minute possible to answer your questions and customization your program.

1. Your account is now activated and ready to use.

- a. Access your program: <https://login.moneymaxaccount.com/>
- b. Reset your password to one that is confidential for you.
- c. We have prepared a Monthly Budget Worksheet to help you prepare for your personal coaching session: [Click Here to Download Worksheet](#)

ANALYSIS: Master

Congratulations!

Your **Money Max Account** is now activated and ready to use! Your Client ID is [REDACTED]. Please have this ID available whenever you contact support so that we can better serve you.

Here's how to get started:

- 1. Access Your Program**

Open your internet browser to <https://login.moneymaxaccount.com>. Use the username and password you selected in the previous step to login to the program. If you have forgotten your password, you can click on "Reset Password" or call support at 877-576-5563.
- 2. Complete the Setup Wizard**

The first time you log in to the Money Max Account, you will be prompted to complete the Setup Wizard. The Setup Wizard will guide you through customizing the Money Max Account to work for your financial situation.
- 3. Get to know your program**

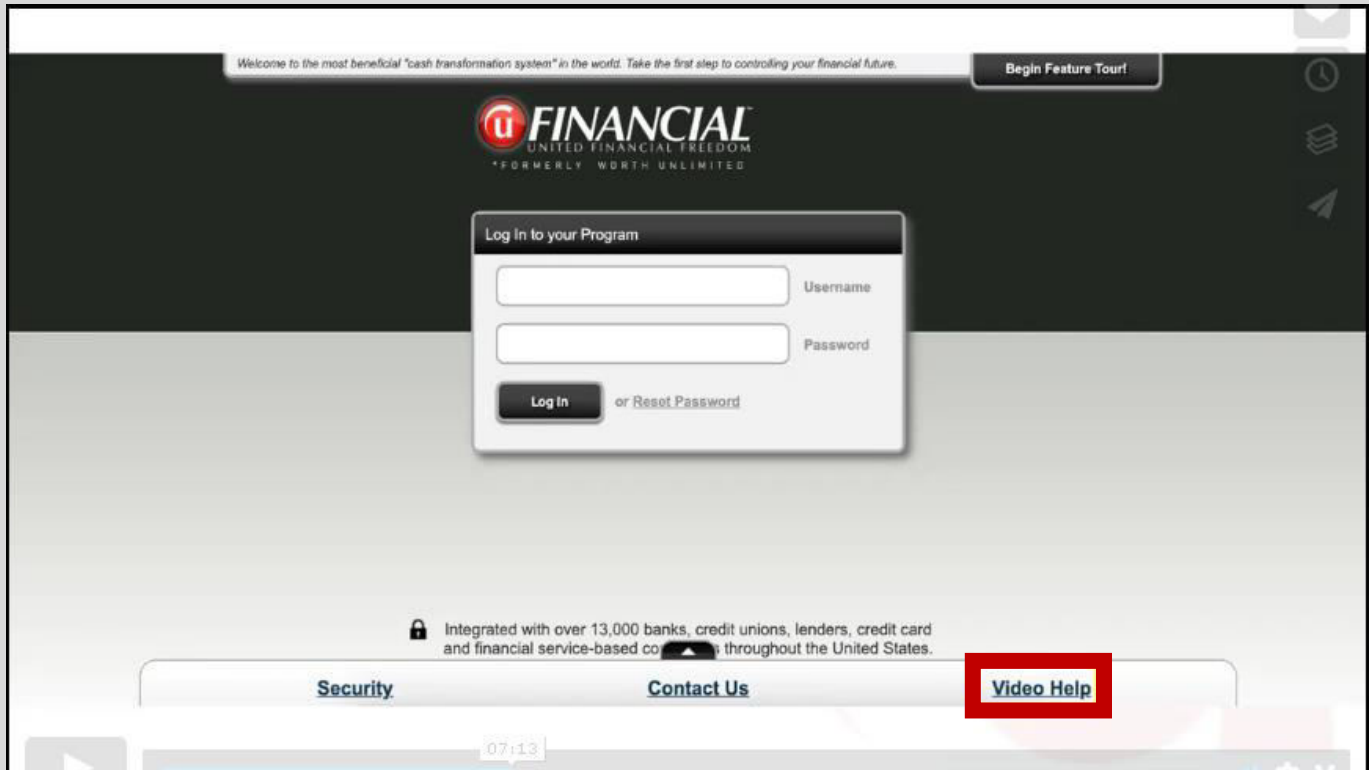
Attend your FREE one-on-one training session on **February 12, 2020 at 7:00 PM EST** and we will help you make the most of your Money Max Account and start you

Account Details:	
Client ID:	[REDACTED]
Program Url:	https://login.moneymaxaccount.com
Username:	[REDACTED]

Money Max Account Training Appointment:	
Date:	February 12, 2020
Time:	7:00 PM EST
Duration:	1:00 hour(s)
Status:	Scheduled
Re-Schedule Training	

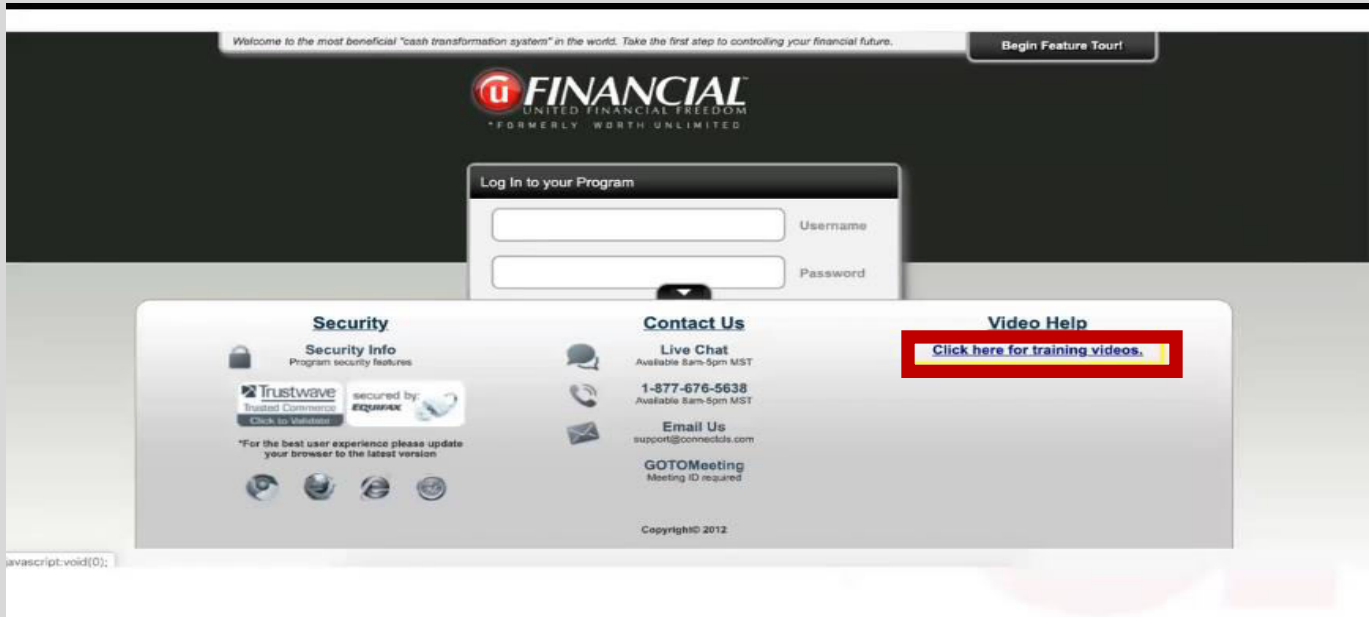
Support:	
Email:	support@ufinancialfreedom.com
Phone:	877-576-5563
Hours:	Mon - Fri, 8:00 am - 5:00 pm Mountain Time

2. Complete the Setup Wizard – Complete this before your Coaching Session. Not mandatory, but strongly suggested to provide you a more productive session.
 - a. Access your program: <https://login.moneymaxaccount.com/>
 - b. Look for “**Video Help**” lower right corner.



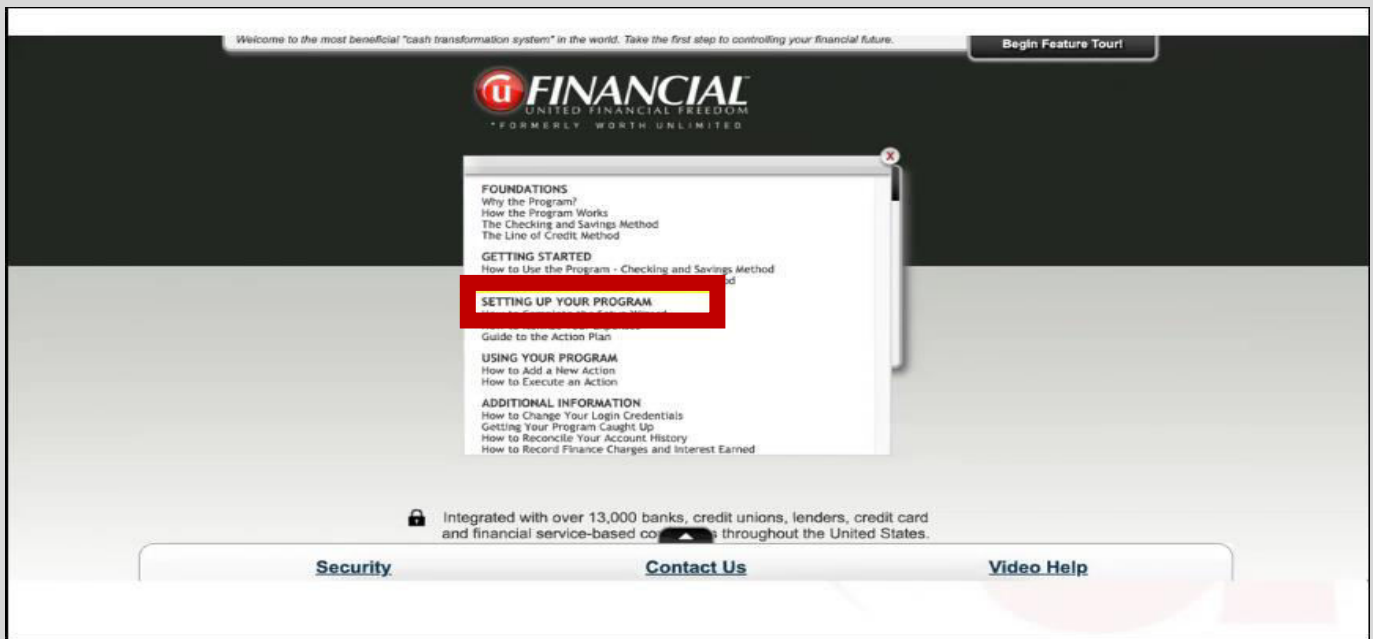
Click “**Video Help**” on the lower right side

Here is the Help Menu:



Click the above item: “**Click here for training videos**”

Here is a List of the Money Max Account Training Videos



Go to the **“Setting Up Your Program”** Section and
Then Click on **“How to Complete the Setup Wizard”**



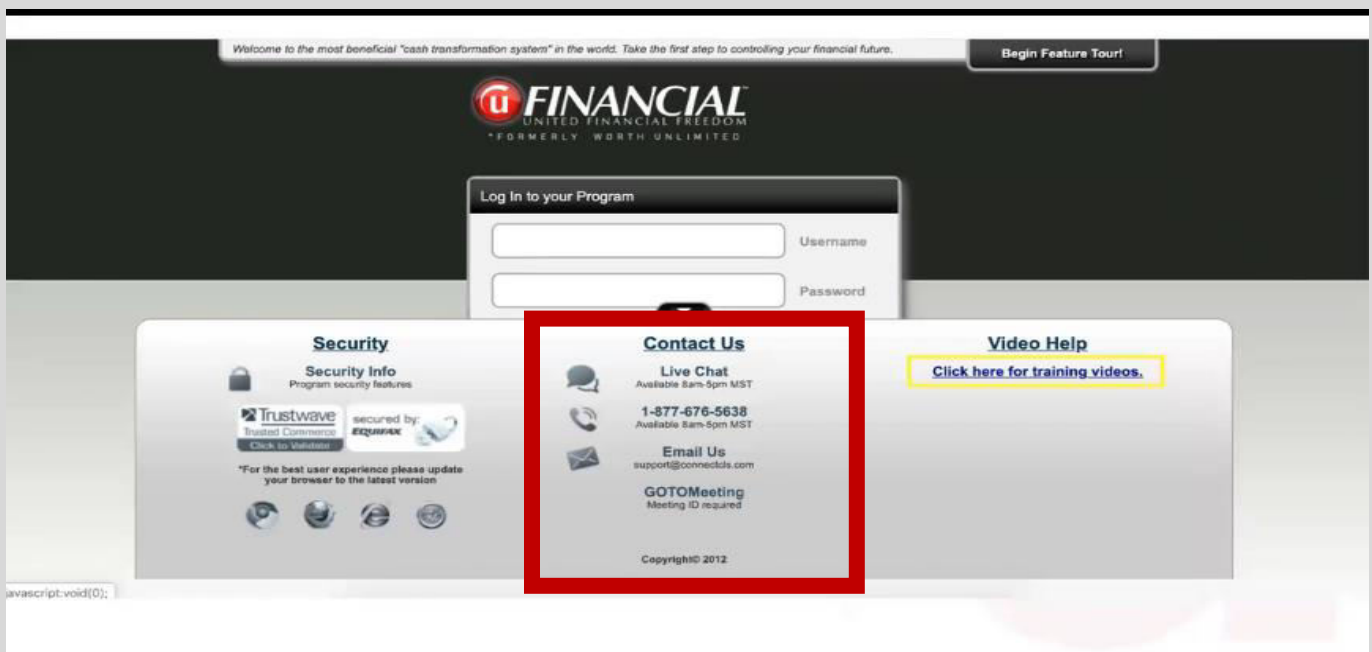
Here is a 3:41 minute Video that walks you through the initial steps to get your account ready for the Coaching Session. To view the video directly – [CLICK HERE](#)

3. Should you need assistance, call your UFinancial Agent. If they are not available, contact the Home Office Client Support Department: 877.676.5638



Click on “Up Arrow” to show you the contact options

Your Options for Additional Assistance are Shown Below:



“A Commitment to Excellence in Support”

Call – Email – Live Chat – Available To All MMA Clients

Call, Email, or Live Chat...whichever works best for your clients! They are able to get their questions answered so they can understand the process before their Coaching Session.

If the Set-Up Wizard is not done, they may need multiple Coaching Sessions to complete their onboarding process for their new MMA program. Remember, our MMA clients may schedule multiple Coaching Sessions.

Going through this Set-Up Wizard process will ensure that your clients know how to log into their account and will also provide for a much smoother Personal Coaching Session.

As your clients go through the Set-up Wizard, they will be able to label the accounts the way that they will want them identified when their account goes live.

Send The Monthly Budget Worksheet

If the client charges most of their monthly expenses on a credit card and does not want to know the monthly details of their spending, they don't need to itemize their budget. They can simply enter in one line item for their Credit Card monthly bill. This process is for those who pay for the majority of their monthly expenses on the credit card and pay off that entire credit card balance (or cards) every month.

The Monthly Budget Worksheet is for those who want to itemize their monthly expenses and generally pay for them from their bank accounts. They want to see and record every possible monthly expense to determine where their income is being spent.

The Coaching Session is like building a house. The Coaches will “build the house” so that all your client has to do is “move in.” The Budget Worksheet is sent to the new Money Max Account (MMA) client after they purchase their MMA program and before their Personal Coaching Session. This will allow them to prepare a rough budget of monthly bills coming out of checking/savings accounts. [Click Here to Download Worksheet](#)

If clients have more than one checking and one savings account, they need to specify which account their paychecks go into and which accounts their bills get paid from each month. This can be done on the Budget Worksheet.

Caller ID

Coaching calls frequently go to voicemail if the coach is calling a client's cell phone that has spam filters installed. Let clients know to remove spam filters from cell phone.

Recommend that the client save the Customer Support # in their cell: **877.676.5638**

The client's Caller ID may say "UFF" or "UFinancial"

Account Connect

This an optional monthly service that connects the client's Money Max Account with over 13,000 financial institutions that will automatically download the client's transactions into their Money Max Account Action Plan.

This service will pull the data into the Money Max Account, and then the client will need to "Accept" the transaction data (called "execute" within the program).

Remember, **NOT ALL** financial institutions are connected to this optional program called "Account Connect". Credit Unions, some credit cards, and local vendors (gas company, local utilities, electric, etc.) may not be connected to be able to pull that data into the client's Money Max Account. If that is the case, the client will have to manually update those transactions. This is not a service that covers all institutions, nor transactions! It costs \$13.95/month and is not a profit center for UFinancial.

Additional Information

Coaching sessions are 1.5 hours long. If a coach is running late, another coach will call the client to let them know their coach is running late.

Agents are **NOT** to be on the coaching call as this slows down the coaching process.

When in doubt about this process, call your upline, CFT, Executive Director, or Field Partner, NOT the Home Office.





The Client Coaching Session

► **Chapter Resources** ◀





The Money Max Account

Client Coaching Session – Preparation Steps



On behalf of United Financial Freedom, we congratulate you on registering for your new Money Max Account and are looking forward to your personal coaching session. Our goal is to provide you a learning session that will allow your program to be fully customized to match your goals and objectives for now and the future.

Since we have a full 90 minutes that we will be spending together, we want to respect your time and to be as productive as possible. To prepare for our time together, we have a few items that we ask for you to complete prior to our scheduled session so we are able to use every minute possible to answer your questions and customization your program.

1. Your account is now activated and ready to use.

- a. Access your program: <https://login.moneymaxaccount.com/>
- b. Reset your password to one that is confidential for you.
- c. We have prepared a Monthly Budget Worksheet to help you prepare for your personal coaching session: [Click Here to Download Worksheet](#)

ANALYSIS: Master

Congratulations!

Your **Money Max Account** is now activated and ready to use! Your Client ID is [REDACTED]. Please have this ID available whenever you contact support so that we can better serve you.

Here's how to get started:

- 1. Access Your Program**
Open your internet browser to <https://login.moneymaxaccount.com>. Use the username and password you selected in the previous step to login to the program. If you have forgotten your password, you can click on "Reset Password" or call support at 877-576-5563.
- 2. Complete the Setup Wizard**
The first time you log in to the Money Max Account, you will be prompted to complete the Setup Wizard. The Setup Wizard will guide you through customizing the Money Max Account to work for your financial situation.
- 3. Get to know your program**
Attend your FREE one-on-one training session on **February 12, 2020 at 7:00 PM EST** and we will help you make the most of your Money Max Account and start you

Account Details:

- Client ID: [REDACTED]
- Program Uri: <https://login.moneymaxaccount.com>
- Username: [REDACTED]

Money Max Account Training Appointment:

- Date: February 12, 2020
- Time: 7:00 PM EST
- Duration: 1:00 hour(s)
- Status: Scheduled

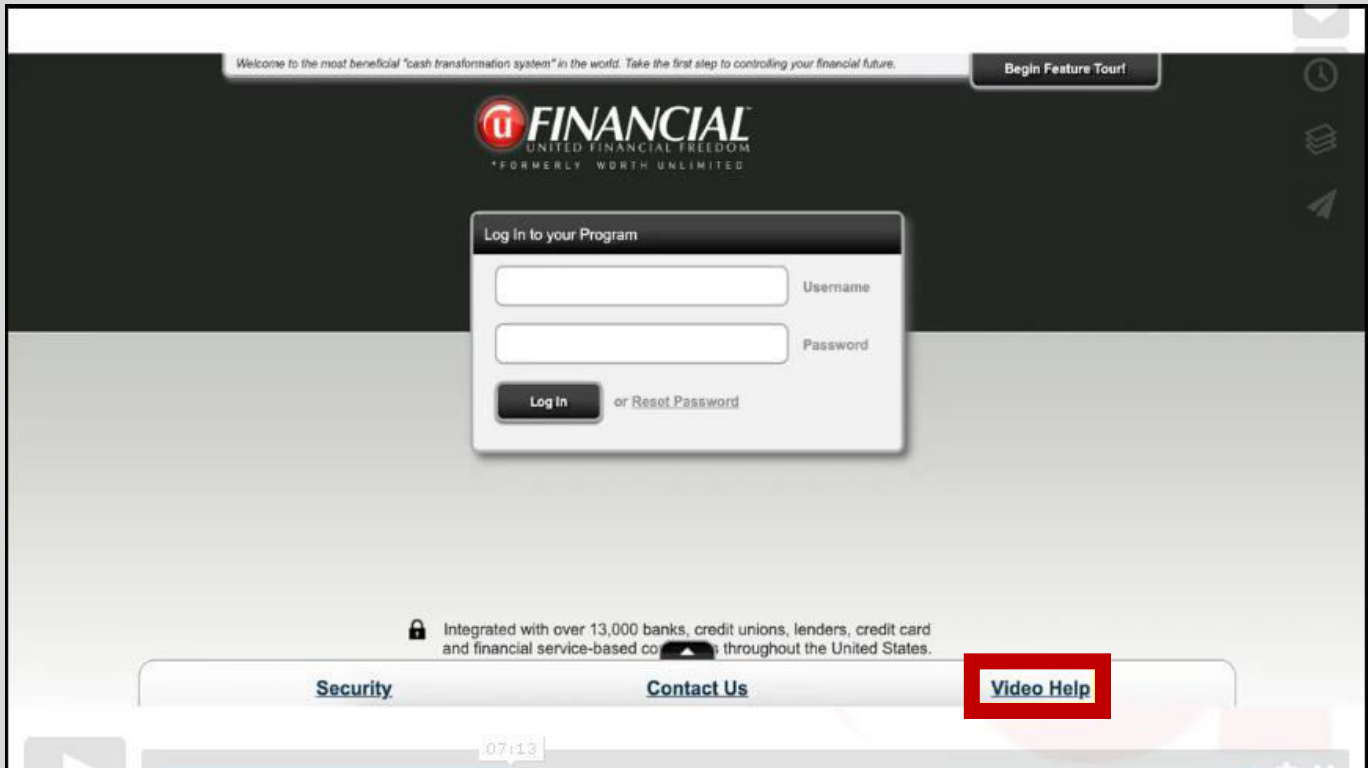
[Re-Schedule Training](#)

Support:

- Email: support@ufinancialfreedom.com
- Phone: 877-576-5563
- Hours: Mon - Fri, 8:00 am - 5:00 pm Mountain Time

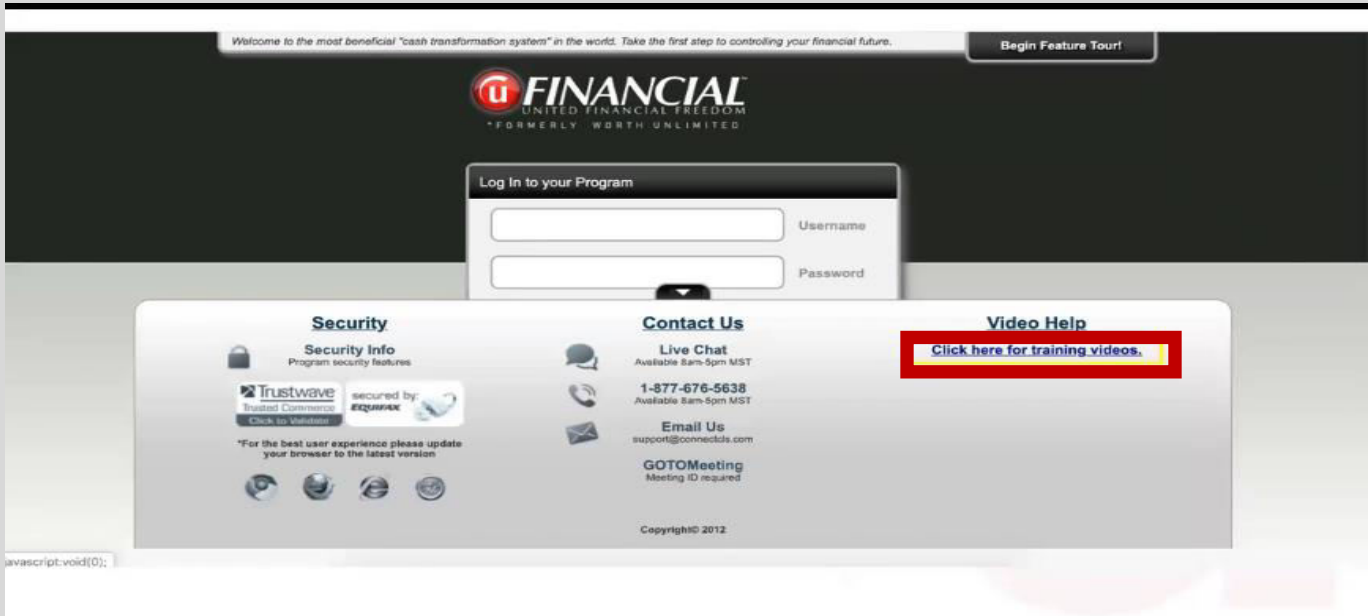
2. Complete the Setup Wizard – Complete this before your Coaching Session. Not mandatory, but strongly suggested to provide you a more productive session.

- a. Access your program: <https://login.moneymaxaccount.com/>
- b. Look for “**Video Help**” lower right corner.



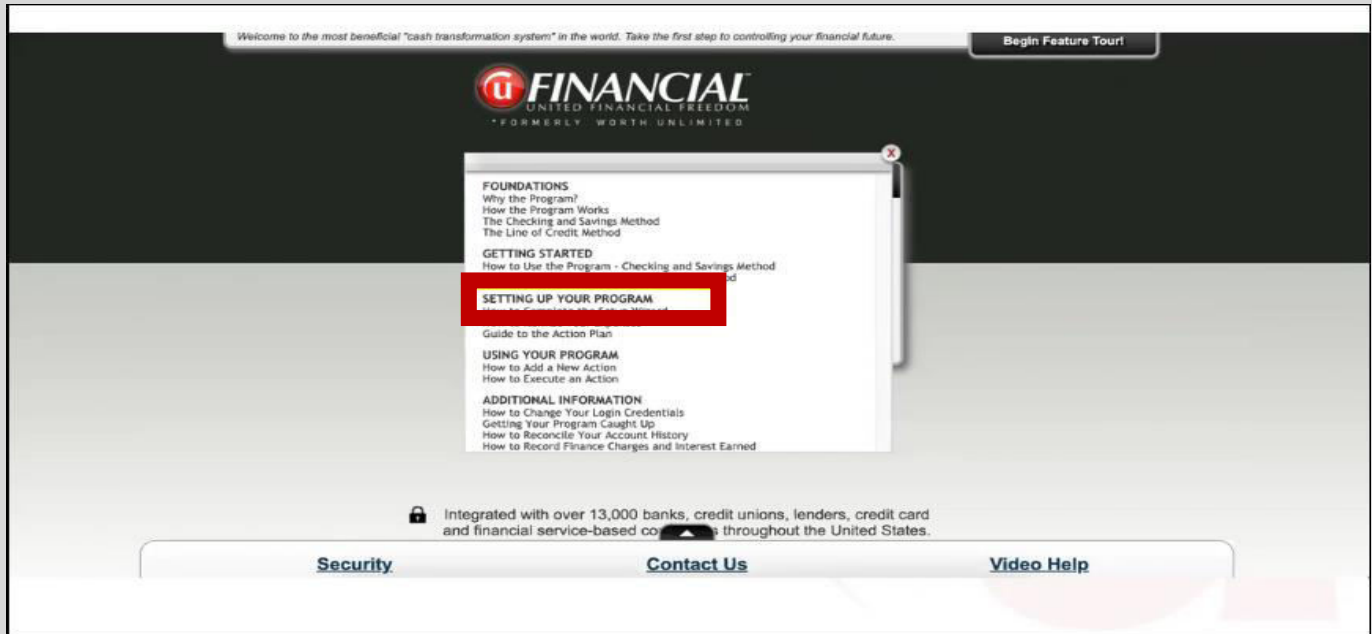
Click “**Video Help**” on the lower right side

Here is the Help Menu:



Click the above item: “**Click here for training videos**”

Here is a List of the Money Max Account Training Videos



Go to the **“Setting Up Your Program”** Section and
Then Click on **“How to Complete the Setup Wizard”**



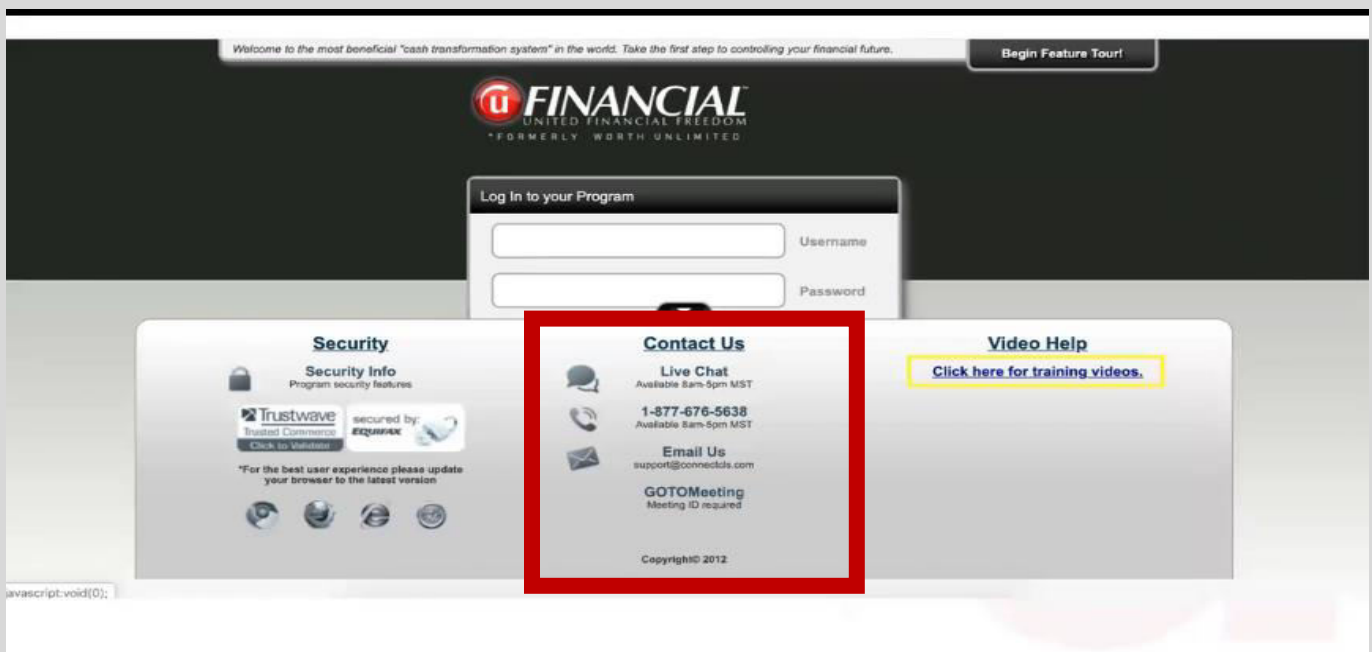
Here is a 3:41 minute Video that walks you through the initial steps to get your account ready for the Coaching Session. To view the video directly – [CLICK HERE](#)

3. Should you need assistance, call your UFinancial Agent. If they are not available, contact the Home Office Client Support Department: 877.676.5638



Click on "Up Arrow" to show you the contact options

Your Options for Additional Assistance are Shown Below:



"A Commitment to Excellence in Support"



Email to Send to Client After MMA Purchase



Click Here to Download This Document

To: Prospect
From: UFF Agent
Subject: Congratulations! and Welcome to Your New Money Max Account

Hello XXXXX,

Congratulations for taking the first step on the way to your debt free date! This is just the start of an incredible journey towards financial freedom and building wealth beyond what you can ever imagine. Your Money Max Account is going to be your guide as you quickly become Debt Free along with being your Digital Financial Advisor that will be with you and supporting you the rest of your life.

I am so happy to have been a part of this process with you and can't wait to hear your results over the coming weeks, months, and years. PLEASE continue to share your "wins" with me as it is the most rewarding part of what I do.

As discussed, PRIOR to your coaching session, we recommend you do two things:

1. **Complete the Set Up Wizard** – you can do that by going to your Money Max Account login page. Click on this link: <https://login.moneymaxaccount.com> to prepare for your first time to log into your account. BEFORE you log in, I would recommend that you watch the Training Video called "*How to Complete the Set Up Wizard.*" To access this video, click the "*Video Help*" button in the bottom right corner of the login page screen and then choose, "*Click here for training videos*" and you will see a list of the many help videos available. The third section of videos (*Setting Up Your Program*) is where you will see this recommended video as the first one in that section. It is a short 3 minutes and 41 seconds long and will guide you on your first steps when you initially login to your Money Max Account. To go directly to this video, [CLICK HERE](#). To download the "*Coaching Session Instructions*" - [CLICK HERE](#).
2. **Fill out the attached Budget Worksheet** – this is some of the information the coach will be working with you on during your coaching session. By having this completed ahead of time, it will help your session be more productive for you. Remember, the coach is going to "build the house" for you, and then...you receive the wonderful benefits of living in it! This worksheet information will give the coach the tools needed to build your customized financial house. To download the "*Budget Worksheet*" - [CLICK HERE](#).

Lastly, we are so happy you are embarking on this journey and we KNOW it will change your life! If you have any questions, please do not hesitate to ask. Thank you for letting us serve you.

Best Regards,



Household Budget Worksheet

Monthly Income	Net Income	Frequency (Wky/Mo/BiWky)	Next Paycheck Date	Deposited Into Which Account?
Person #1: Job 1				
Person #1: Job 2				
Person #2: Job 1				
Person #2: Job 2				
Child Support Income				
Alimony Income				
Incoming Rental Income				
Other Income				
TOTAL	0			

Monthly Expenses	Minimum Payment	Extra Payment	Frequency	Next Due Date	Paid From Which Account?
Mortgage**					
Rent					
Property Taxes (if not escrowed)					
Homeowners/Association Dues					
Home Equity Loan **					
Line of Credit**					
Car Loan **					
Car Lease					
Student Loan					
Entertainment					
Home Insurance (if not escrowed)					
Life Insurance					
Health Insurance					
Auto Insurance					
Parking					
Tolls/EZ Pass					
Gasoline					
Public Transportation					
Cable TV					
Internet					
Home Phone					
Cell Phone(s)					
Daycare/Babysitting					
Groceries					
Dining Out					
Pet Care/Vet					
Gym Membership					
Gas Bill					
Electric Bill					
Water Bill					
Charity					
Savings					
TOTAL	0	0			

Other Expenses Not Listed:

Monthly Expenses	Minimum Payment	Extra Payment	Frequency	Next Due Date	Paid From Which Account?
TOTAL	0	0			

**Should already be reflected in your Money Max Account





New Agent Manual

▶ Resource Center ◀



The Pathway to Success

Training Resources

WEBSITES

Agent Back Office: <https://portal.ufinancialfreedom.com/Account/Login>
Agent Training: <https://uffpowerteam.com/>
MMA Login: <https://login.moneymaxaccount.com/>
Team Zoom: <http://TomsWebRoom.com/>
Rapid Funnel: <https://RapidFunnel.com/>
Zoom Accounts: <https://Zoom.us>
Calendly Program: <https://Calendly.com>
Opportunity Site: <https://UFFOpportunity.com/YourCustomName>
Money Max Site: <https://MoneyMaxAccount.com/YourCustomName>
MMA Video Site: <https://MoneyMaxAccount.com/YourCustomName/videos>

ONLINE TRAINING AND TEAM MEETINGS

Every 1st and 3rd Monday evening of each month at 8:00 PM ET – Different UFF Leaders present a National UFinancial presentation focusing on various sectors of the Financial Industry, Corporate Environments, Local and National Organizations and more. These cover areas such as Real Estate, Mortgage, Loan Officers, Insurance, Securities, Churches, Small Businesses and more, sharing the many benefits available for collaboration between UFinancial and these various Business Sectors. The Zoom room is www.TomsWebRoom.com. Invite as many guests as you like. It generally lasts about 30-35 minutes.

Every 2nd and 4th Monday evening at 8:00 PM ET – Mac Saunders of the UFinancial Corporate Team hosts a Money Max Account Client Presentation. You register for this in your UFinancial Agent Back Office. This presentation generally lasts about 45 minutes.

Every Tuesday afternoon at 2:00 PM ET – Different UFF Leaders present the National UFinancial Corporate Business Overview presentation. The Zoom room is www.TomsWebRoom.com. Invite as many guests as you would like to have attend. It generally lasts about 30-35 minutes.

Every Tuesday evening at 8:00 PM ET – The UFinancial Corporate Team hosts a National Agent Training along with providing company updates and announcements. You register for this in your UFinancial Agent Back Office. This training meeting lasts about one hour.

Every Wednesday evening at 8:00 PM ET – Tom Keener (The very first UFF Agent and our Team's Master Trainer) ... hosts a weekly national team online meeting to share ideas, national announcements, contests, recognition of individuals, and much more. The Zoom room is www.TomsWebRoom.com. This meeting is for UFF Agents only. It generally lasts one hour.

Every Thursday evening at 8:00 PM ET - Different UFF Leaders present the National UFinancial Corporate Business Overview presentation. The Zoom room is www.TomsWebRoom.com. Invite as many guests as you like. It generally lasts about 30-35 minutes.

Mornings (Mon, Tues, Thurs, Fri) at 10:00 AM ET – This is a **national round table discussion for training, product info and much more**. The Zoom room is www.TomsWebRoom.com. This is a come and go session that is packed with great info. It lasts about 90 minutes depending on where the conversation and participation goes.

Monthly – Fast Start Training School – This is held once a month on a Saturday (the schedule will always be posted on the Main Communication Portal – <https://UFFPowerTeam.com>). Over a power packed four hours being broadcast online, you will be provided some of the highest levels of information, training and experience from a series of speakers who are some of the most successful leaders in the company. They will be sharing professional and proven skills that you can implement immediately. This is a fast paced and extremely professional business school that will have a tremendous impact on the growth and success of your UFinancial business. When this Training School is held live, it is held across the country in different cities over two days and expands even further into areas of training and business skills to assist you in building a successful United Financial business.



50% of Winning Is
Just Showing Up!

Opportunity Meetings

Date _____ Date _____

Date _____ Date _____

Team Trainings

Date _____ Date _____

Date _____ Date _____

Fast Start Training

Date _____

Coffee Calls

10 AM – 11:15 AM EST

Go To Team Website

For Schedule

<https://uffpowerteam.com>

RECORDS ARE MADE
TO BE BROKEN!

1st 45 Days

TOP RECRUITER

Name _____

of Recruits _____

TOP PRODUCER

Name _____

Volume _____

Fastest To Executive Director

Name _____

Days _____

Base Shop

RECRUITS

Name _____

of Recruits _____

PRODUCTION

Name _____

Volume _____



 Click Here to Download This Document

Pathway to Success

From Associate to Executive Director



*“Committed Action is the
Key to All Success”*

- ___ Find Your WHY
- ___ Goals
- ___ Business Hours
- ___ Activity Level
- ___ Names List
- ___ Scripts/Role Play
- ___ Accountability
- ___ Set Up Rapid Funnel
- ___ Back Office
- ___ UFFPowerTeam.com

9 Training Modules

○ ○ ○ ○ ○ ○ ○ ○ ○ ○

Field Training Appointments

1. _____
2. _____
3. _____
4. _____
5. _____
6. _____
7. _____
8. _____

THE PURPOSE OF FIELD TRAINING IS TRAINING!

PROMOTIONS & INCOME ARE A BYPRODUCT.

Fast Track To Sr. Assoc. 3-2-1

Recruits:

1. _____
2. _____
3. _____
4. _____
5. _____
6. _____
7. _____
8. _____
9. _____
10. _____

MMA Volume

_____	_____
_____	_____
_____	_____
_____	_____
_____	_____

SUCCESS LINE

Recruit's Name

Start Date

UFF #

Certified Field Trainer

Name

Phone #

Email

UFF #

Executive Director

Name

Email

UFF #

Pathway to Success from Associate to Executive Director in 6 Months

Areas of Performance	Month 1	Month 2	Month 3	Month 4	Month 5	Month 6
End of Month Promotion Level	Associate to Sr. Associate (3-2-1)	Director Plus CFT	Senior Director	Managing Director	Executive Director	Paid as an Executive Director
Recruits	3	3	2	1	1	3
Training Sales	2	3	3	4	4	4
Personal Sales	2	2	2	2	2	2
Team Personal Sales		1	1	2	2	3
Personal Sales Volume	10500	12250	12250	14000	14000	14000
Team Sales Volume	10500	21000	21000	28000	28000	31500
Cumulative Personal Volume	10500	22750	35000	49000	63000	77000
Cumulative Team Volume	10500	31500	52500	80500	108500	140000
Monthly Compensation	\$2,810	\$3,910	\$3,910	\$5,330	\$6,500	\$8,600
Monthly Bonus Pool		\$800	\$800	\$1,000	\$1,000	\$2,000
Cumulative Compensation	\$2,810	\$7,520	\$12,230	\$18,560	\$26,060	\$36,660
This Illustration is Using an Average Sale of \$3,500			Road to Executive Director: 6 Month Average Compensation - \$6,110/month			

DUPLICATION STARTS WITH PERSONAL ACTIVITY AND COMMITMENT	Weekly Activity Needed	Minimum Monthly Goals	Executive Director	Executive Director
Help your Agents to Receive the 3-2-1 Promotion and CFT Promotion	2-3 Prospects Presented	2-3 New Agent Recruits	\$150K per year*	\$200K per year*
A Minimum of 1 Agent Promotion Every 30-45 Days	The UFF Opportunity Presentation	From Your UFF Opportunity Presentation Appointments	2 Personal Sales per Month	2 Personal Sales per Month
Daily Activity Needed				
Complete 6 Prospecting Calls	Minimum of 3 Prospects	2 Personal MMA Sales	10 Base Shop Agents	15 Base Shop Agents
Personally Speak to 3 Prospects	Receiving The 3		Averaging 2 Sales	Averaging 2 Sales
Send the 3 Pathway to Success Videos to 2 Prospects	Pathway to Success Videos	2-4 MMA Training Sales	Per Month	Per Month
Follow up with 2 Prospects	After Videos Are Watched	Sending Videos Leads to		
Schedule 2 GPS1 Appointments	By Your Prospects,	GPS Appointments,		
Add Contacts to Your Prospecting List	Schedule the GPS1 Appt.	Which Leads to Sales	*Estimation	*Estimation

"Committed Action is the Key to All Success"



The Pathway to Success

Links to All Resources in the Manual

First Steps Documents

Activity Compensation Calculator	Download to Print – Click Here
Assoc. to Exec. Director in 6 Months	Download to Print – Click Here
Memory Jogger	Download to Print – Click Here
Initial Prospecting Scripts	Download to Print – Click Here
Getting Started Training Videos	Download to View – Click Here
Rapid Funnel Tutorial	Download to View – Click Here
Accountability Tracker	Download to Print – Click Here
Tri-Fold Success Guide	Download to Print – Click Here
W-9 Form for Commissions	Download to Print – Click Here
UFF Compensation Plan	Download to Print – Click Here
UFF Policies and Procedures	Download to Print – Click Here

From Prospect to Client

Rapid Funnel Tutorial	Download to View – Click Here
Initial Prospecting Scripts	Download to Print – Click Here
Rapid Funnel Texts and Emails	Download to Print – Click Here
Rapid Funnel Text for Follow Up	Download to Print – Click Here
Email to Schedule GPS1 Appointment	Download to Print – Click Here
Debt Free Analysis Worksheet	Download to Print – Click Here
Text to Follow up on GPS1 Email	Download to Print – Click Here
GPS1 Appointment Reminder Text	Download to Print – Click Here
Email to Send Between GPS1 & GPS2	Download to Print – Click Here
GPS2 Appointment Reminder Text	Download to Print – Click Here
Email to Client After MMA Purchase	Download to Print – Click Here
Client's Coaching Session Instructions	Download to Print – Click Here
Coaching Session Budget Worksheet	Download to Print – Click Here

From Prospect to Agent

Rapid Funnel Tutorial	Download to View – Click Here
Initial Prospecting Scripts	Download to Print – Click Here
Rapid Funnel Texts and Emails	Download to Print – Click Here
Rapid Funnel Text for Follow Up	Download to Print – Click Here
Email to Schedule GPS1 Appointment	Download to Print – Click Here
Debt Free Analysis Worksheet	Download to Print – Click Here
Text to Follow up on GPS1 Email	Download to Print – Click Here
GPS1 Appointment Reminder Text	Download to Print – Click Here
Email to Send Between GPS1 & GPS2	Download to Print – Click Here
GPS2 Appointment Reminder Text	Download to Print – Click Here
Email to Client After MMA Purchase	Download to Print – Click Here
Client's Coaching Session Instructions	Download to Print – Click Here
Coaching Session Budget Worksheet	Download to Print – Click Here
New Agent Welcome Email	Download to Print – Click Here

New Money Max Account Client's Coaching Session

Email to Client After MMA Purchase	Download to Print – Click Here
Client's Coaching Session Instructions	Download to Print – Click Here
Coaching Session Budget Worksheet	Download to Print – Click Here





Pathway to Success

From Associate to Executive Director

"There is a powerful driving force inside every human being that, once unleashed, can make any vision, dream, or desire a reality."

Anthony Robbins

