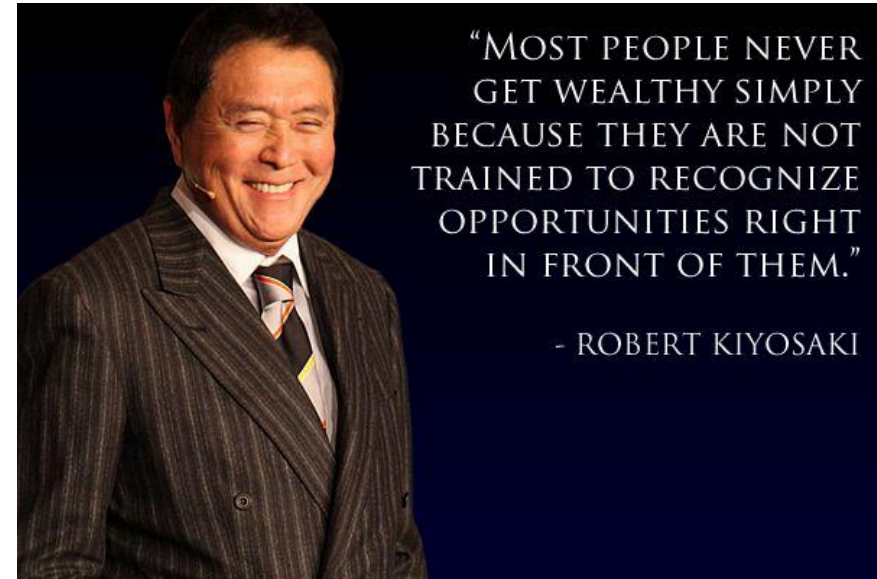
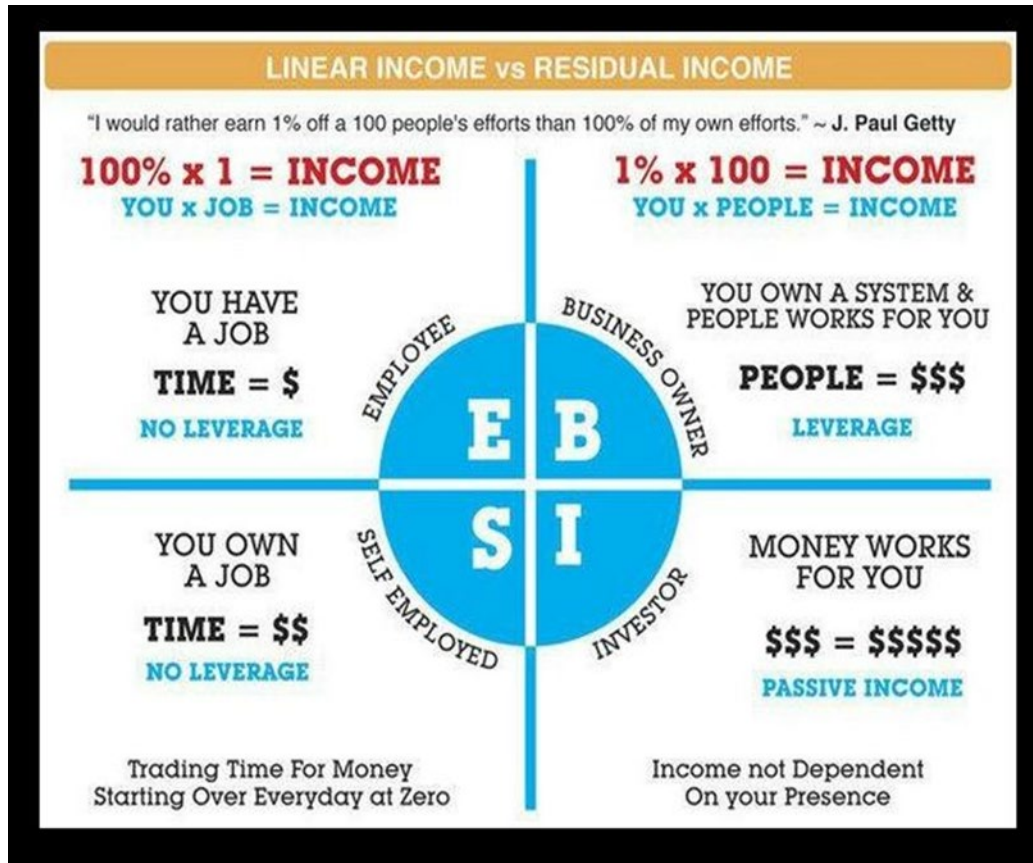




ORIENTATION

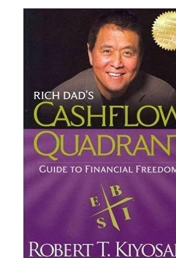
ELIZABETH TSENG / WFG EXECUTIVE VICE CHAIRMAN

WHY WFG



The primary difference between a rich person and a poor person is how they manage fear.

- Robert Kiyosaki





DREAM IS EVERYTHING

Are you in WFG to make a living (rich) or live a great life (wealthy)?

What are you working hard for ? And What is your DREAM?

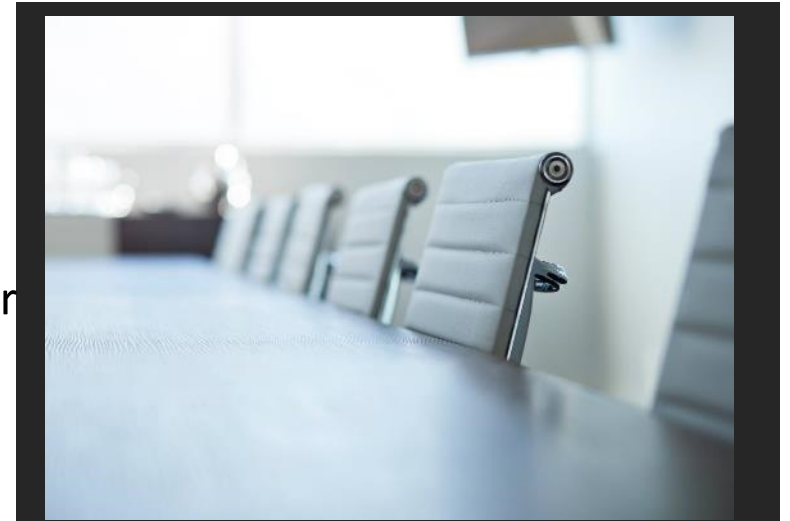
What is your working hours?

- Study Licensing
- Booking or In Appointment

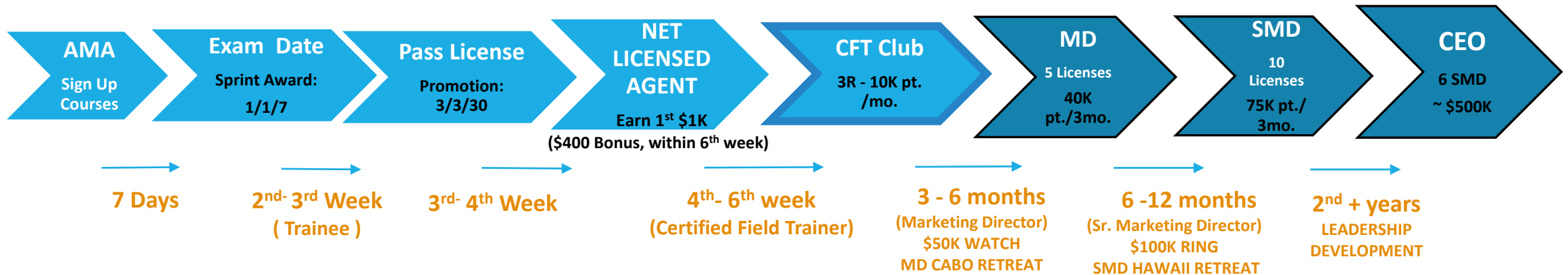
What are you willing to sacrifice for 2-3 years to achieve your dream?

HOMEWORK: TOP25 DREAM

WEEKLY BUSINESS SCHEDULE



CHAMPION'S PATH



LICENING IS FREEDOM !

1/1/7 -> Licensing -> Production -> Cash Flow -> Promotion -> Leadership Development -> Lifestyle

CHAMPION'S PATH: 15 STEPS TO SMD

**NEW
ASSOCIATE**

1

**PRE-LICENSE
PROCESS**

2

**PERSONAL
FINANCIAL
REVIEW**

3

1-1-7

4

**PASS STATE
LIFE EXAM**

5

**POST LICENSE
PROCESS**

6

**BUSINESS
PLAN
WITH MD/SMD**

7

**TRAINING
APPOINTMENTS
(TOP 3 MACHO W/ SMD)**

8

**GRAND
OPENING**

9

**ON-BOARDING
(WFG Agent 3wks)**

10

**BECOME A NET
LICENSE**

(BONUS in 4-6 weeks)

11

**EARN
PROMOTION**

(3/3/30; 10/10/30)

12

**BECOME A
CERTIFIED FIED
TRAINER**

13

**MD LEADERSHIP
FACTORY**

14

**QUALIFY FOR
SMD**

15

NEW ASSOCIATE

- GET YOUR WFG AGENT CODE
- RECEIVE WELCOME EMAIL FROM WFG
- ACCESS [WFGDIRECT.COM](https://wfgdirect.com) (CA) OR [WFGLAUNCH.COM](https://wfglaunch.com) (OTHER STATES)
- GET ADDED ON TELEGRAM
- SET-UP FREE ZOOM ACCOUNT

1

PRE-LICENSE PROCESS

2

- SCHEDULE ZOOM APPT WITH LICENSING COORDINATOR – JOANNE or ELIZABETH
- SIGN-UP FOR PRE-LICENSING COURSE: XCEL
- SCHEDULE STATE EXAM
- ATTEND PRE-LICENSING CLASS
- ATTEND BPM-THE CRUSADE, ORIENTATION CLASS

1. PRE-LICENSING PROCESS \$198

☐ SIGN UP PRE-LICENSING LIFE & HEALTH COURSE 30 days (\$36)

California Only : WFG.EXAMFX.COM (Lifetimechampions@gmail.com)

- \$29.95 “Video study package- Life & Health + Specialty Training Bundle”
- \$6 State Reporting Fee (CA only)

ALL STATES: XCELSOLUTIONS.COM (LifetimeChampions)

- [\\$35.95 “Online course](#) + Applicable state reporting fees”

☐ SCHEDULE STATE LIFE & HEALTH LICENSE EXAM (\$88)

- Print out confirmation form with your unexpired photo ID to the Exam site

California Only: <https://home.psiexams.com/#/home>

- Select “Log in -Sign Up” to create account -> Schedule an Exam (2.5Hr,150Q, 60% pass)
 - > Organization: CA Department of Insurance Exam
 - > CA PSI site - Life, Accident and Health Examination (\$88)
 - Or CDI site- Life, Accident and Health Examination (\$55) + Los Angeles Parking fee
- (You may schedule, reschedule or cancel at least **2 business days in advance** without additional fee using PSI website or call [PSI at \(833\) 518-7456](tel:8335187456))

Arizona Only: <https://live-prometric.pantheonsite.io/arizona/insurance> (150Q, 70)

OTHER STATES: <https://home.pearsonvue.com>

- “Ready Set Test” -> Texas Department of Insurance/ Florida Insurance-> Create Account

☐ ATTEND BPM-THE CRUSADE CLASS, ORIENTATION CLASS

PERSONAL FINANCIAL REVIEW

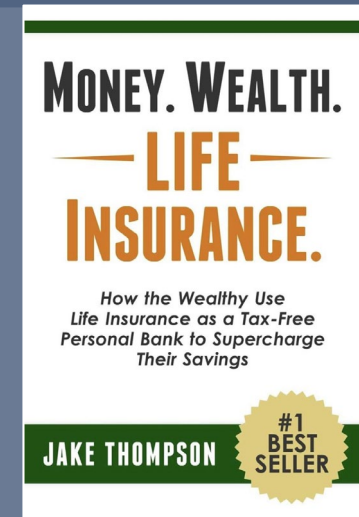
3

- GO OVER GOALS & DREAMS
- COMPLETE FINANCIAL NEEDS ANALYSIS
- DIME #
- FIN #
- PROFESSIONAL RECOMMENDATIONS

1-1-7: SPRINT AWARD

4

- ❑ READ MONEY, WEALTH & LIFE INSURANCE BOOK
- ❑ BECOME A CLIENT: 1 APPLICATION
- ❑ RECRUIT 1 BUSINESS PARTNER (STUDY BUDDY)
- ❑ NEW BUSINESS PARTNER GOES THROUGH THE CHAMPION'S PATH TOGETHER
- ❑ REGISTER EXAM



PASS STATE EXAM

(3HR/DAY, 10 DAYS PASS)

5

- PRINT & STUDY KEY FACTS
- PASS ALL CHAPTER QUIZES (PRE-LICENSING STATE ONLY. LEARN FROM YOUR MISTAKES)
- TAKE YOUR CRAM EXAM (200 Q, Avg. 4-5 TIMES)
- PASS STIMULATE EXAM (180 Q, Avg. 2-3 TIMES)
- 3 DAYS BEFORE EXAM DATE, TAKE THE GUARANTEED EXAM
- COMPLETE (52 HOUR COURSE CERTIFICATE) STATE REQUIREMENTS
- MORNING OF, REVIEW YOUR KEY FACTS

POST-LICENSE PROCESS

6

- COMPLETE FINGERPRINTS
- COMPLETE THE STATE APPLICATION
- CHECK STATUS OF LICENSE ON SIRCON / NIPR #

- SUBMIT AGENT AGREEMENT
- COMPLETE & SUBMIT CONTINUING EDUCATION
(AML, LTC & ANNUITIES)

AFTER PASS EXAM: POINT & COMP BUSINESS PLAN

WEEK 3

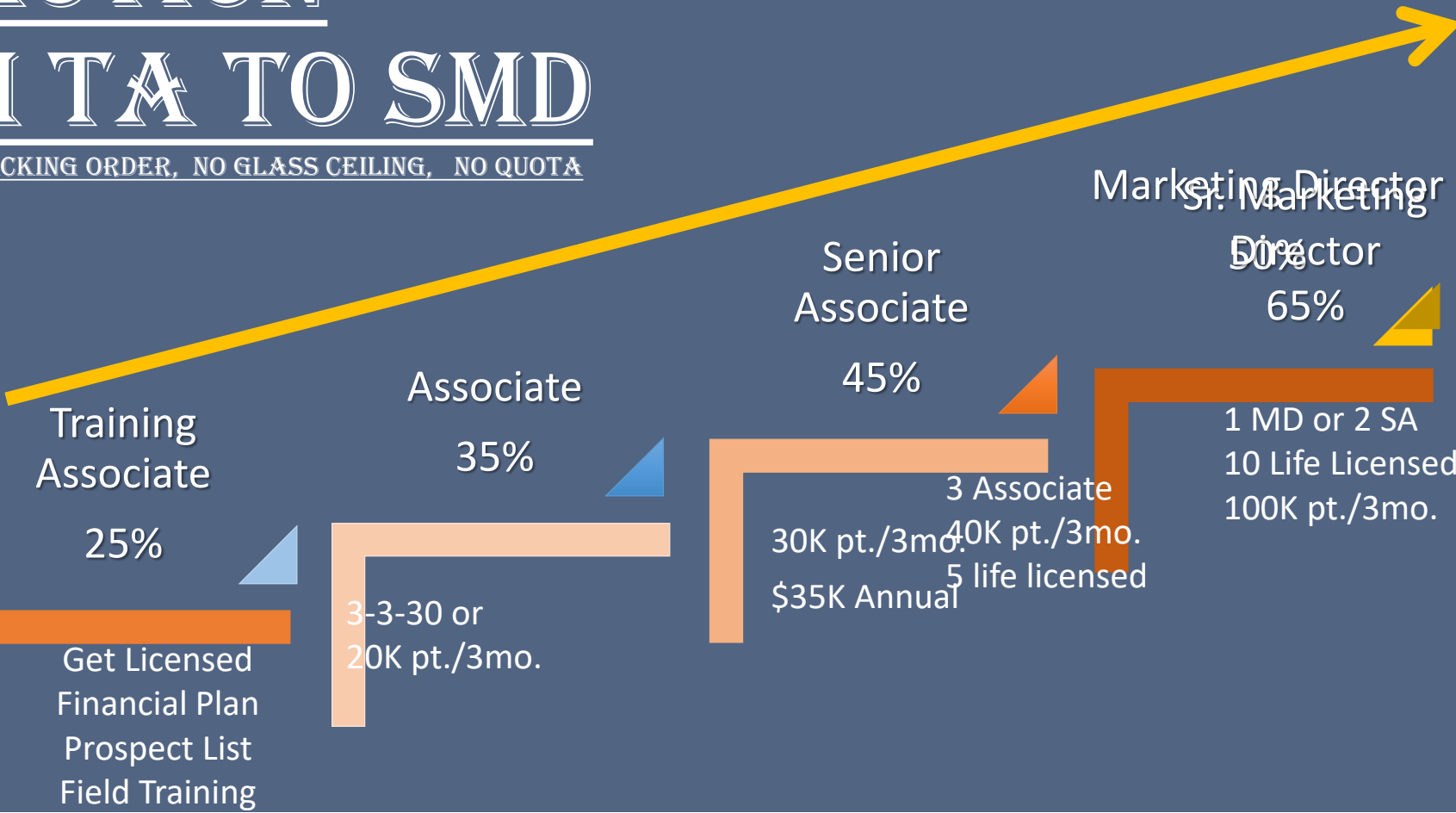
BUSINESS PLAN WITH MD/SMD

- FINISH 1/1/7
- TOP 25 DREAM
- SHOW COMPENSATION PLAN
- LAUNCH CHAMPIONS PATH ON HOW TO GET PROMOTED
- SELLING THROUGH CURIOSITY:
LIST BUILDING, INVITING, TIME MANAGEMENT & CONNECTING
- TOP 100 LIST & PROFILE INTO 4 SEPARATE TOP 25 LISTS
(1. FAMILY 2. FRIENDS 3. BUSINESS OWNERS 4. SOCIAL MEDIA)

7

PROMOTION FROM TA TO SMD

NO TIMELINE, NO PACKING ORDER, NO GLASS CEILING, NO QUOTA



WFG Executive Agency Director
 65%+ \$100K BONUS (Annual)

Repeat
 Build 3 SMD
 500K pt/ 6mo.

* CEO – 50/50/30,
 6 SMD, 1Mpt/6mo.\$500M
 * EVC – 100/100/30
 9 SMD, 1.5Mpt/6 mo., \$1M

PERSONAL INCOME: TA= \$750 A=\$1,050 SA=\$1,350 MD= \$1,500 SMD= \$1,950

TEAM INCOME: Business Development Override on the Spread between you and your licensed agent.

POINT X CONTRACT LEVEL = COMMISSION

IUL \$250/mo.= 3,000 pt.; FIA \$50K= 3,000pt.

- 5 Element of FAST START:**
1. Register for Course & Exam ate
 2. Financial Need Analysis
 3. Top 25 list – Trainer has a copy
 4. 3 Guests & 3 FT
 5. Meeting commitment
/ Register next big event

4. WHO and HOW CAN WE HELP?

M.A.C.H.O

(SAVING \$ -> FNA-> CLIENT)

- Married
- Age : 25 +
- Child
- Home Owner
- Occupation:
> \$150K Household Income



B.A.D.

(MAKE \$ -> AMA-> BUSINESS PARTNER)

- Business Minded
- Ambitious / Growth Mindset
- Dissatisfied
- **S.T.E.A.M.**
Sales / Teacher / Enthusiastic
Ambitious / Money Motivated

BUSINESS PLAN WITH MD/SMD

7

- THE IMPORTANCE OF FIELD TRAINING : GOLDEN TRIANGLE
- THE RESTAURANT EXAMPLE
- THE NEXT CONTEST, NEXT BIG EVENT AND NEXT ELITE
- THE IMPORTANCE OF MEETING ATTENDANCE
- MATCH UP TOP 3 MACHO WITH MD/SMD : PRE-GRAND OPENING
- SCHEDULE NEXT APPOINTMENT TO MAKE CALLS
- CHALLENGE THEM TO BE A NET RECRUIT IN THE NEXT 30 DAYS

GOLDEN TRIANGLE unlimited referrals and clients

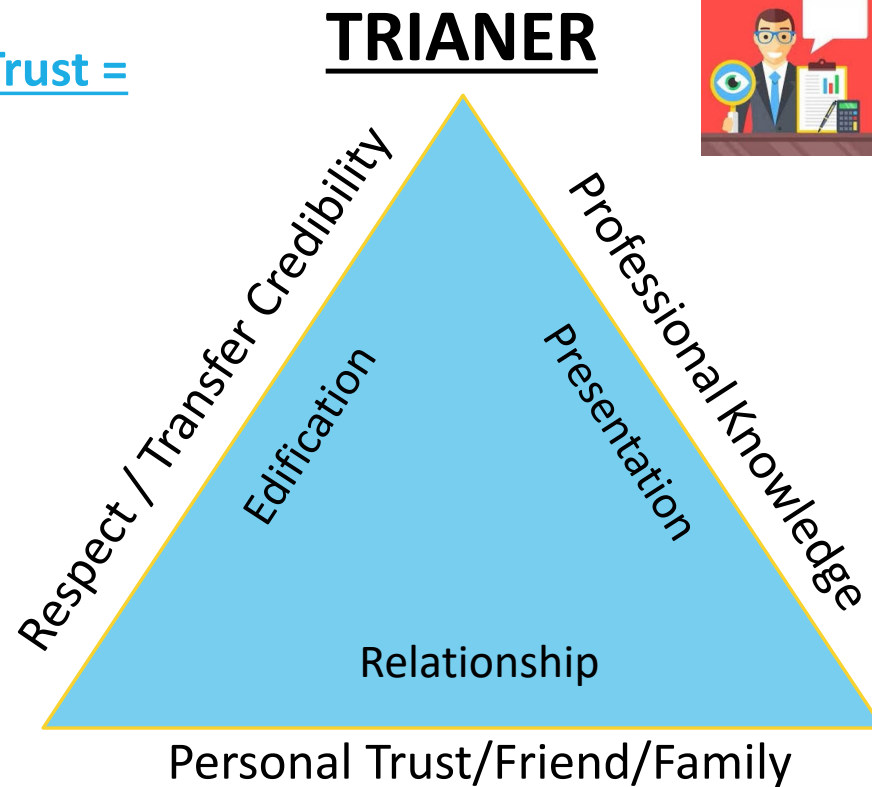
PERSONAL Trust + PROFESSIONAL Trust = Success Field Training

- Trainee –
Trust & Personal Credibility
- Trainer –
Professional Knowledge & Expertise

“Two Roles are Separated”



TRAINEE



RESTAURANT EXAMPLE

(Pre-Grand/ Soft Opening/Launch party)

WHO would you invite to your **LAUNCH PARTY**?

WHO is your **PR Campaign manager** to help you getting the result ?

OUTCOME:

- 1) Some who are simply "**IMPRESSED**" with your Restaurant.
- 2) Some who will "**REFER OTHERS**" to visit your Restaurant.
- 3) Some who will enjoy the food & become regular "**CUSTOMERS/CLIENTS**" of your Restaurant.
- 4) Some who would like to work with you in your Restaurant and perhaps open additional locations in the future as a "**BUSINESS PARTNER**" of yours.



Success Vehicle

BUILD A TEAM

1. Big Income
2. Secure Income
3. Growing Income
4. Passive Income

**“All great things
come to those who
build a
BIG BASESHOP”**
~ WFG founders

PRESENTATION

(M.A.C.H.O)

1. Financial Needs Analysis
2. 10 Field Trainings
3. 30 MIN.
4. Undivided attention
5. Edification
6. Take NOTES
7. Become CFT

**NO FAMILY LEFT
BEHIND!**
~ WFG mission

MEETINGS

1. BUSINESS MEETING
Tuesday 6 PM-7:30 PM
Saturday 9 AM-10:30 AM
2. SPECIAL TRAINING
ENTREPRENEUR (M) 9AM-10:30AM
AGENT (Thu) 10AM-11:30AM
3. BOOTCAMP (quarterly)
 - SUPER SATURDAY
 - Elite Circle/ Growth Academy
4. BIG EVENT (annually)
 - WFG CONVENTION
 - CHAMPION GALA

LICENSE

1. Life & Health License~\$350
 - Pre-Licensing courses (\$35)
 - Register Exam (\$88)
 - Pass State Exam (\$250)
CA:150 Questions; 60% = Pass
2. Security License (optional)
 - Federal Regulation
 - S6 & S63 (MF)
 - S65 (AUM)

**DON'T DELAY YOUR
PAYCHCECK !**

AFTER PASS EXAM: SCRIPTING FIELD TRAINING

WEEK 4

TRAINING APPOINTMENT

8

- ❑ MATCH UP TOP 3 MACHO WITH MD/SMD : PRE-GRAND OPENING
- ❑ LEARN & MASTER "THE HELP ME SCRIPTS": ETHOR
- ❑ LEARN HOW TO EDIFY TRAINER
- ❑ LEARN HOW TO SET-UP APPOINTMENTS & OVERCOME OBJECTIONS
- ❑ LEARN IMPORTANCE OF MACHO CLIENTS
- ❑ LEARN & MASTER 1st PRESENTATIONS: BRIFING, DEBRIFING
- ❑ MATH UP REST WITH CFT

GRAND OPENING

9

- ESTABLISH GRAND OPENING DATE
- ESTABLISH GRAND OPENING LOCATION EITHER VIA ZOOM OR LIVE
- INVITE GUEST SPEAKER: SMD/ MD and CFT
- CREATE POSTER FOR THE GRAND OPENING
- CREATE THE GUEST LIST
- INVITE GUEST TO GRAND OPENING
- SMD/MD CALL AND COMFIRM THE GUEST ATTENDANCE

ON-BOARDING

10

- RECEIVE WELCOME EMAIL FROM WFG AS AN APPROVED LICENSED AGENT
- SET UP YOUR MYWFG ACCOUNT
- PAY/SETUP FOR YOUR RECURRING PLATFORM FEE
- PAY FOR E&O'S
- SET UP YOUR DIRECT DEPOSIT
- GET APPOINTED WITH PLATINUM PROVIDERS

NET LICENSE

11

- ATTEND BUSINESS MEETING AND AGENT TRAININGS
- LICENSED & APPOINTED
- COMPLETE YOUR 1-1-7
- BECOME A CLIENT
- KNOW POINT & COMPENSATION
- EARN YOUR FIRST \$1,000 IN THE BUSINESS

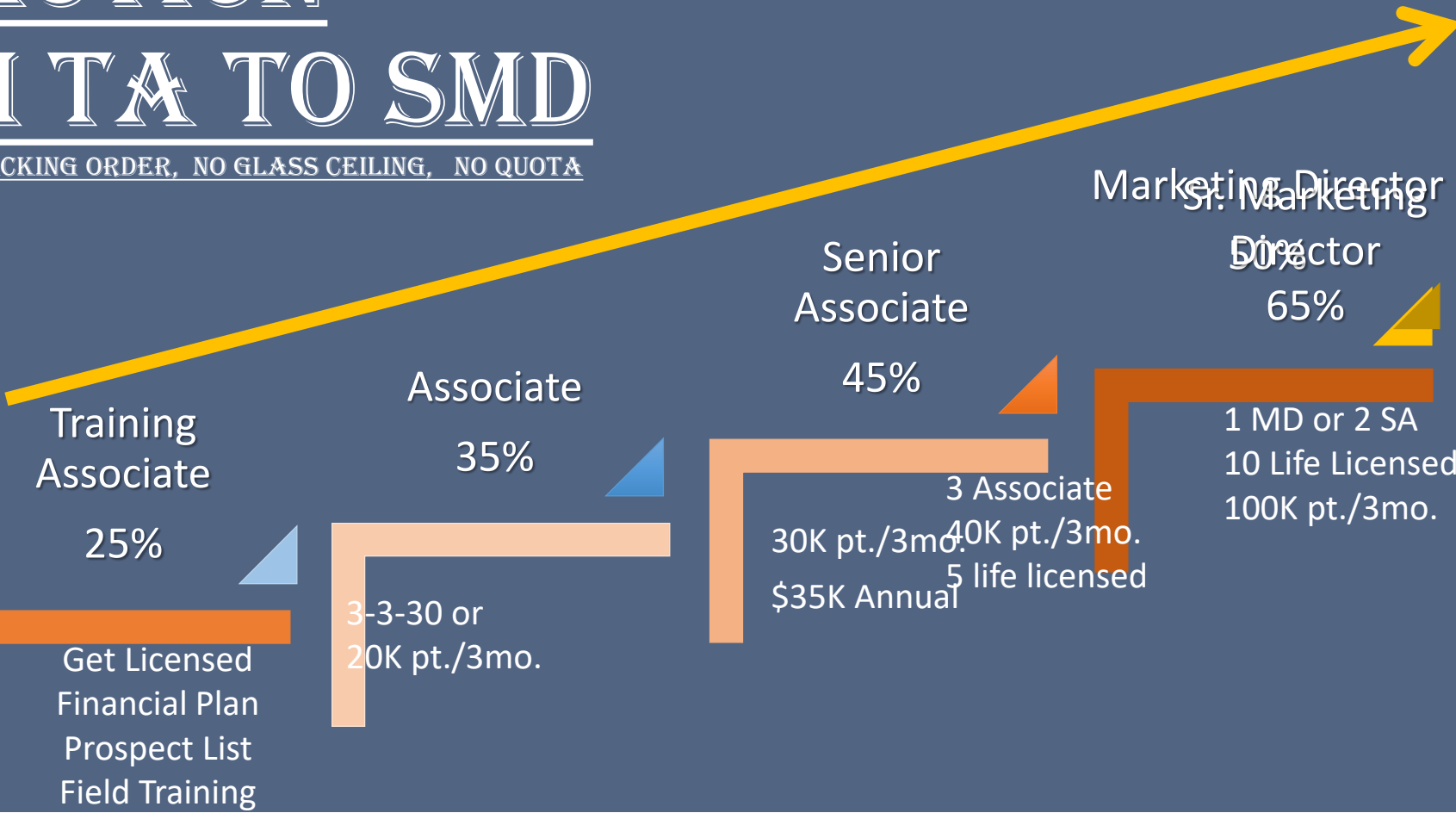
EARN PROMOTION

12

- ❑ ASSOCIATE PROMOTION (3-3-30)
- ❑ SENIOR ASSOCIATE PROMOTION (10-10-30)
- ❑ MD PROMOTION
- ❑ \$50,000 WATCH
- ❑ \$100,000 RING
- ❑ SMD PROMOTION

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JOIN

- Associate Code Number (AMA)
- Attend Weekly FREE Training
 - Pass the license

OWN

- Personal Financial Strategy
- Establish SUITABLE and affordable plans

SHARE

- Share with others
- Leverage Experts

3/3/30: 1ST PROMOTION (40% RAISE)

3 BUSINESS PARTNERS (AMA) & 3 APPLICATIONS (10,000 PT) IN 30 DAYS



Thank you

Elizabeth Tseng

310.409.9960

@elizzytseng

CERTIFIED FIELD TRAINER

13

- WATCH A CLIENT PRESENTATION 10 TIMES
- RECORD YOURSELF DOING THE PRESENTATIONS
- DO YOUR PRESENTATION FOR 3 MD'S
- KNOW HOW TO CLOSE & PRESENT: COMPENSATION, CLIENT PRESENTATION, TERM, IUL, EVEREST, ANNUITY
- GET SIGNED OFF BY YOUR SMD

LEADERSHIP FACTORY

14

- ❑ QUALIFY FOR ELITE CIRCLE TRAINING
- ❑ START SPEAKING & TRAINING IN THE BASESHOP
- ❑ QUALIFY FOR CHAMPION BUILDERS AWARD: 5.5.30 (3 MONTHS IN A ROW), 50K TEAM POINTS IN 90 DAYS
- ❑ SEEK MENTORSHIP & BE ACCOUNTABLE
- ❑ DOMINATE IN THE BASESHOP

GET PROMOTED TO SMD

15

- ❑ 10 LICENSED AGENTS
- ❑ 1 STRONG EXCHANGE LEG
- ❑ EARN \$50,000 WATCH
- ❑ EARN \$100,000 RING
- ❑ 75,000 TEAM POINTS IN 3 MONTHS
- ❑ GRADUATE ELITE CIRCLE & NEXT LEVEL GROWTH ACADEMY