New Agent Checklist

Welcome to Symmetry Financial Group! To get started on the right track, there are a few steps we recommend you follow, which are outlined below. Once complete, be sure to check in with your upline for onboarding steps specific to your agency.

Complete Onboarding Training

☐ **Step 1**
Review the Agent Handbook for important information on working with SFG.

Pay close attention to Symmetry's Core Values.

☐ **Step 2**
Register for SymmetryU (the corporate learning management system), complete the "FastTrack" new agent onboarding course, and discover all of the training resources available to help you succeed!

Establish Your Schedule

☐ **Step 3**
Work with your upline to determine your work schedule, allotting time to tune into weekly national conference calls, make dials, visit clients and help families, recruit, and complete necessary office work. Ask your upline about call and/or training schedules specific to your agency.

You will start receiving weekly newsletters from the home office that contain valuable information about corporate news, events, call schedules, leaderboards, and more. Be sure to stay on top of all the updates!

Sign In to Your CRM

☐ **Step 4**
After obtaining credentials, sign in to sfgcrm.com to purchase leads and manage your client database. Connect with your upline to make a game plan for your first lead order!

Learn how to use the CRM software here.

Learn the Scripts, Dial & Prepare for Appointments

☐ **Step 5**
Learn the B.E.S.T. System Phone Script. Check with your upline for audio trainings to help you learn the script!

Use this Activity Report to track your progress when setting appointments. Connect with your upline after every five contacts to let them know your numbers. You should aim for a minimum of 250 dials and 12-15 appointments each week.

☐ **Step 6**
Learn the R.E.A.L. System In-Home Script. Check with your upline for audio trainings to help you learn the script!

Make sure you understand the Critical Period Coverage Script for special cases.

Familiarize Yourself With Core Carriers & Products

☐ **Step 7**
While you have access to over 30 top-rated carriers, we recommend you start with a focus on our core carriers:

American Amicable

Foresters

Mutual of Omaha

United Home Life

Meet with your upline for more guidance on which carriers and products to start with.

Write Your First Policy – On Yourself

☐ **Step 8**
Symmetry Financial Group believes that the best training is on-the-job training. Additionally, we believe that everyone should have life insurance, especially agents. As an agent with Symmetry, you are eligible to apply for life insurance coverage through the My Policy Program, and we will cover your first year of premiums! The My Policy Program also allows you to walk through the process of completing an e-application to help you become more comfortable with the process and more confident in clients' homes. Get started today by visiting sfglife.com/mypolicy.

Help Families

☐ **Step 9**
Get out there and run your appointments! Helping families is our goal, and the best way to learn is by doing.

Tools for Your Success

☐ **Step 10**
Visit store.sfglife.com to browse branded products like business cards, folders, brochures, badges, apparel and more! Your upline can help you determine which items are best to start with.

Although not required by all carriers, you can protect and build your business with E&O Insurance. Symmetry Financial Group offers a sponsored program to bring agents broad coverage at competitive pricing. Enroll here.

As a Symmetry agent, you will have access to industry-leading tools that will help you grow your business and generate more sales. Check out some of the Quility Toolkit options below and visit toolkit.sfglife.com for more information.

Quility Toolkit
*Designates recommendations for new producers. Ask your upline which tools to start with.

CARE TO SHARE *

A turn-key online referral program designed to help you generate referrals.

EVERPLANS *

Increase cross-sell opportunities with a digital vault that helps clients prepare for their family's future while securing your place as a trusted partner.

OWNER'S CIRCLE

Create a custom website with the request-a-quote feature, a personalized domain, and email addresses for your team.

VIRTUAL ASSISTANT

A digital management tool to help you with lead allocation, key performance indicator tracking and agent level reporting.

VIRTUAL MENTOR

Empower your team with on-the-go access to a range of carrier and product resources to generate initial quotes, find best-fit products and close the deal.

POWER DIALER *

Increase outbound productivity by 300-400% with a one-touch dialing system that helps you reach clients more efficiently.