



CHECKLIST TO BE A “QUALIFIED” FIELD TRAINER

- Observed at least 12 appointments with your FIELD TRAINER
- Have a FINRA SERIES 6 & 63 license
- Receive approval from your RVP
- Ability & confidence with FNA input
- Ability & Confidence with presenting FNA
- Ability to explain BUY TERM & INVEST THE DIFFERENCE
- Ability to use S.T.E.A.M.
- Ability to use N.E.A.D.S
- Ability to “coach” using E.T.H.O.R.
- Track record of closing Life new business
- Track record of closing mutual fund business
- Track record of closing Fixed & Index Annuity programs
- Have acceptable QBI (70%)
- Track record of Personal Recruiting
- Ability to complete Life application & IBAs via TURBO
- Ability to complete Life application & IBAs via paper application
- Ability to explain Primerica Life policy
- Ability to GET REFERRALS
- No COMPLIANCE issues
- Consistently attending office Training & Opportunity Meetings
- Communicates daily with up-line Regional Leader & RVP