Take the first steps toward building the business you’ve always wanted.
Name: ____________________________________________

Date Started: ______________________________________

Licensed Trainer: ____________________________________

Senior Marketing Director (SMD): ______________________

Top 25 Market List  Reviewed by: 

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Field Training  Reviewed by: 

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Guest (BPM/One-on-One)  Reviewed by: 

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WFG Financial Needs Analysis  Reviewed by: 

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Training Materials  Reviewed by: 

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

SMD Signature: ____________________________________________

For training purposes only. For internal use only.
Part 1

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

**Step 1**  
Complete the Top 25 Target Market List  
Date Completed: _________________________

**Step 2**  
Begin Field Training  
Date Completed: _________________________

**Step 3**  
Bring a Guest to a BPM or Have a One-on-One Overview  
Date Completed: _________________________

**Step 4**  
Complete your WFG Financial Needs Analysis*  
Date Completed: _________________________

**Step 5**  
Obtain & Review Fast Start Training Material:  
The WFG System Manual  
Date Completed: _________________________

* The WFG Financial Needs Analysis, developed by World Financial Group, is based on the accuracy and completeness of the data provided by the client. The analysis uses sources that are believed to be reliable and accurate, although they are not guaranteed. Discuss any legal, tax or financial matter with the appropriate professional. Neither the information presented nor any opinion expressed constitutes a solicitation for the purchase or sale of any specific security or financial service.
**Step 1** Complete Top 25 Target Market List

**Executive Memory Jogger**

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

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Profile:  
1. 25+ Years  
2. Married  
3. Children  
4. Home Owner  
5. Solid Business Background  
6. Income  
7. Dissatisfied  
8. Entrepreneurial
# Top 25 Worksheet

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

**Go Out with a Qualified Trainer for Field Training**

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

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<th>Date</th>
<th>Prospect Name</th>
<th>Field Trainer Name &amp; Signature</th>
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Step 3  Bring a Guest to a BPM

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Step 4  Complete Your Financial Needs Analysis

Date ________________________________
Client Name __________________________ DOB __________ □ Non-Smoker □ Smoker
Spouse Name __________________________ DOB __________ □ Non-Smoker □ Smoker
Address ___________________________________________________________ 
Home Phone __________________________ Work Phone ______________________
Cell Phone __________________________ E-mail ____________________________

Goals
Retirement ___________ Home ___________ LTC ___________ Retire Parents ___________
Education ___________ Vacation ___________ Travel ___________ ______________________________________

Monthly Income
Combined Gross __________________ combined Net __________________ Discretionary __________________

Monthly Expense
Mortgage/Rent __________________________ Car Insurance __________________
Car Payments ___________ Life/Health Insurance __________________
Utilities ___________ Other Loans __________________
Credit Cards ___________ Car Maintenance/Gas __________________
Food/Clothing ___________ Personal Expenses __________________
Property Insurance __________________ Miscellaneous __________________

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

Liabilities
Mortgage __________________ 2nd Mortgage __________________
Car Loan __________________ Credit Cards __________________
Personal Loans __________________ Other Loans __________________

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

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

☐ $200   ☐ $300   ☐ $400   ☐ Other: $__________

Follow-up Appointment Date __________________________ Client Signature: _________________________

For training purposes only. For internal use only.
Step 5  Obtain & Review Fast Start Training Materials

Read this manual and bring it to Fast Start Training:

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

Refer to the following resources as you build your business:

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

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

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

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

- *Think & Grow Rich* by Napoleon Hill
- *Rich Dad, Poor Dad* by Robert Kiyosaki, Sharon Lechter
- *The Cashflow Quadrant* by Robert Kiyosaki, Sharon Lechter
- *How to Win Friends & Influence People* by Dale Carnegie
- *The 21 Irrefutable Laws of Leadership* by John C. Maxwell
- *How I Raised Myself from Failure to Success in Selling* by Frank Bettger
Part 2**

Admission Packet

Part 2 will be issued during the FAST START Training

Submit Your Securities Registration Paperwork

(U4 in the United States)
(Register for LLQP in Canada)

Date Completed: ________________________________

Fast Start Training Attendance Date: _______________ Deadline Date: _______________

** You have 30 days following the date of FAST START TRAINING to complete Step 2.
# Fast Start Packet Checklist

<table>
<thead>
<tr>
<th>Cover Page – Approval Form</th>
<th>(circle one)</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Is the associate’s name legible and spelled correctly? (The name displayed on the packet will be used on the Fast Start Certificate of Completion)</td>
<td>Yes No</td>
</tr>
<tr>
<td>2. Are all lines on the cover page completed?</td>
<td>Yes No</td>
</tr>
<tr>
<td>3. Has the Approval Committee initialed and approved completion of your packet as being correct, accurate &amp; neat?</td>
<td>Yes No</td>
</tr>
<tr>
<td>4. Did a Senior Marketing Director sign and approve the Fast Start Packet for admission?</td>
<td>Yes No</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Challenge #1 – Approval Form</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Has Step 1 (Top 25 List) been completed?</td>
</tr>
<tr>
<td>2. Has Step 2 (Field Training) been started?</td>
</tr>
<tr>
<td>3. Has Step 3 (BPM/One-On-One) been completed?</td>
</tr>
<tr>
<td>4. Has Step 4 (WFG Financial Needs Analysis) been completed?</td>
</tr>
<tr>
<td>5. Has Step 5 (Fast Start Training Materials) been completed?</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Fast Start – Worksheet</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Do you have names on the list? If yes, How many? ______ (Use Executive Memory Jogger worksheet)</td>
</tr>
<tr>
<td>2. Do you have First and Last names?</td>
</tr>
<tr>
<td>3. Does each name have all applicable profiles circled?</td>
</tr>
<tr>
<td>4. Are names and circled numbers clear and easy to read?</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Top 25 – Worksheet</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Were all names on this list taken from the Fast Start Worksheet? (Names, numbers must be clear and easy to read)</td>
</tr>
<tr>
<td>2. Do you have all 25 required names on this list?</td>
</tr>
<tr>
<td>3. Does each name have all applicable profiles circled?</td>
</tr>
<tr>
<td>4. Is there either a home or office phone number for each name?</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>BPM/One-on-One – Worksheet/Approval Form</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Is the new associate general information complete?</td>
</tr>
<tr>
<td>2. Is the new associate matched up with a qualified Field Trainer?</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>WFG Financial Needs Analysis – Worksheet</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Has the associate completed the WFG Financial Needs Analysis?</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Challenge #2 – Approval Form</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Did you understand that Step #2 will be issued during the Fast Start class?</td>
</tr>
</tbody>
</table>

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Note: If there are any “no” answers to any of the above questions, the entire packet will be rejected and your attendance to the Fast Start Training will be denied. If the packet was rejected, you have until 5 p.m. on the Friday before Fast Start Training to submit the corrected packet for approval by the committee.
Own your future.