

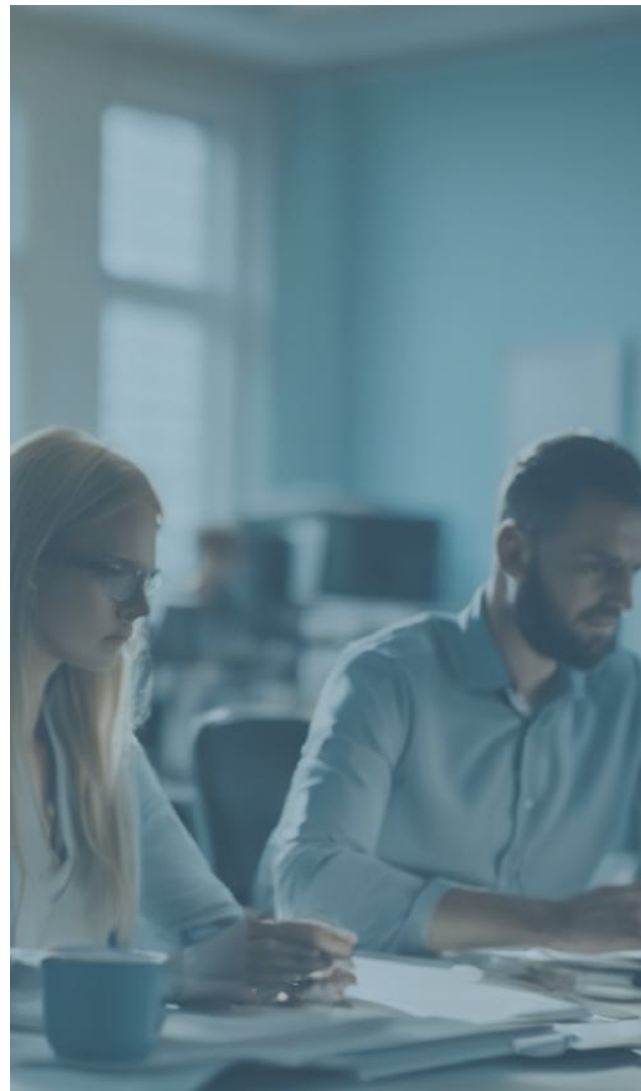
## Everything You Need To Scale Your Recruiting

# Recruiting & Building

The Industry  
Needs Our Help!

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## **IMPORTANT:**

**This manual is for internal use only and not to be shared with the public. Because of the value found in this manual, it is important that we keep all proprietary information and strategies confidential, and to only share it with our active and existing agents!**

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# Global Financial Impact

## Our Vision

We Will Be The #1  
Financial Company In The World

We Will Create The Greatest  
Entrepreneurial Movement The  
World Has Ever Seen

## Our Mission Statement

"Inspiring Families To Dream Again"

## 2030 Commitments

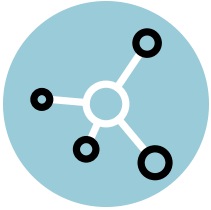
We Will Help the financial lives of 100 Million Families

We Will Help 10 Thousand Agents Earn A 7 Figure Annual Income or More

We Will Do 20 Billion Per Year In Revenue By 2030

We Will Have 1 Million Licensed Agents

# Why We Build An Agency & Focus On Recruiting



## **Supply The Demand**

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Every 11 seconds a Baby Boomer turns age 65, and the Baby Boomer generation accumulated approximately \$84T. Because this generation makes up about 26% of the industry, this has led to a demand that the industry isn't big enough to supply.



## **Change Lives & Impact Different Markets**

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As we continue to grow in diversity it allows us to bring financial literacy and education to different communities, cultures, and demographics.



## **Passive & Residual Income**

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As someone's licensed agency grows larger and those agents begin serving and helping families on their own, more and more families get helped. This allows you to earn income without being present.



## **Promotions Into Leadership Levels**

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In order to take on leadership contracts, there are certain licensed agent criteria that need to be met. As you grow your agency it can lead to promotions, which give you the ability to earn more.



## **Grow Your Licensed Field Force**

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The average licensed agent will generate about 50,000 in net revenue per year. So as you grow your licensed agency, your annual net revenue will increase by default.

# What Makes Us Better Than The Industry?

## ***Most Companies***

- No Real Ownership
- Outdated or No Technology
- 6 to 9 Month Commission Advances
- Capped Commissions: \$2k / \$3k / \$5k
- Low Rollover Compensation
- 1 Main Company
- High Contract With 1 Main Product or Company
- Overrides Flank
- Confusing or Limited Bonuses
- Get Paid Only a % of Target Premium
- Can Only Override Your Own Hierarchy
- No Real System
- Limited To No Training
- Limited To No Leadership
- Employee Ran
- Already Sold: No Upside Potential
- Limited To No Retreats & Trips
- No Business Management Software
- 3 to 6 Week Policy Approvals
- Care Only About The Bottomline

## ***GFI Movement***

- Contractual Ownership
- Full Technology Package
- 12 Month Up Front Annualization
- Uncapped Commission
- Industry Leading Rollover Compensation
- 10 Main Companies (20+ On Shelf)
- High Contract With All Products & Companies
- 7 Generations Builders Compensation
- Clear & On Time Bonuses
- Get Paid 100% of Target Premium
- Can Earn Overrides On The Company
- Proven Real System
- 15+ Trainings Per Week
- Overlapping & In The Trenches Leadership
- Entrepreneurial Movement (Field Lead)
- Plans To Go Public
- Monthly Retreats & Incentive Trips
- Business Management Software
- 10 Minute Policy Approvals
- Want You To Be Successful In All 5 F's

# Your Guide To Recruiting Agencies

## What You Shouldn't Do

1. Insult Them Or Their Company
2. Get Into An Argument With Them
3. Compare Egos
4. Lead With Compensation (Never lead with this)
5. Try To Recruit Them On Your Own Without Personal Results Greater Than Theirs (Leverage Your Leadership)

## What You Should Do

1. **Ask Questions In Order To Find Weaknesses In Their Current Agency Or Platform (Found Below)**
2. **Ask Questions To Find Out What They Feel They Are Personally Missing & Need To Win (Found Below)**
3. **Be Respectful Yet Confident**
4. **Leverage Your Leadership & The Leadership In GFI**
5. **Understand What Truly Separates GFI**
  - A) Ownership
  - B) Leadership
  - C) Proprietary Technology Package
  - D) Culture
  - E) Systems & Processes
  - F) Compensation (Great Personal, Builders, & Rollover Compensation)
  - G) Fulfillment Formula (The 5 F's)
  - H) We Believe In Doing The Right Thing For Our Clients (Companies & Products We Offer)
  - I) Centralized Business Management Software

# Your Guide To Recruiting Agencies

When trying to recruit agencies, think like a doctor. You can't prescribe a solution without first diagnosing a problem. So ask as many questions as you possibly can in order to figure out exactly where they are, what they are missing, what they are looking for, what their hot buttons are, and how their platform works so you can figure out exactly how to beat their platform.

We recommend finding out as much as you can about their model prior to the conversation so you have an idea of how to lead the conversation. Reach out to leadership and they can help you with this.

## Great Questions to Ask

1. Just curious, what is it that you are missing at your current company that leads you to being open to having this conversation today?
2. What if I could help you increase the closing ratio of you and your agents by 40-60%, and help you double to triple your average premium overnight?

Well we have proprietary technology in GFI that gives us the ability to download illustrations and upload them into a computer system that mathematically compares the IUL and every other type of retirement account in the industry demonstrating to the client that they will pay less in fees, less in taxes, and have a greater income and total net worth when going to retire. This removes the needed skill of selling because it is simply math increasing the closing ratio of our agents by 40-60% and it has led to clients no longer asking "what's the least I can put in" but "what's the most I can dump in?"

So, if you came to GFI we can literally help you double to triple your income overnight with our technology, how does that sound?

3. Do you get paid 12 month annualization, or 6-9 month commission advances?
4. Do you get paid 100% of target, or a % of it?
5. I understand that you get paid x%, but is that on every product or a specific product?
6. What is your total field commission on IUL?
7. What % do you get paid on rollovers?
8. What is your commission cap?

# Laws of Building

## Width = Wealth, & Depth = Stability

### Law 1

#### **A Recruit Is Not A Recruit Until They Have A Recruit**

This building law means that we need to get every new recruit a direct business partner with extreme urgency because if you DO NOT, there is a strong probability that they will not stay in business. So by you getting them a recruit (this is called Taprooting) you strengthen their belief in the company, and it also gives you leverage when trying to retain them.

### Law 2

#### **A Leg Is Not A Leg Until It's 4 Deep**

This Building Law indicates that we must Taproot every new business partner 4 deep in recruits. This is what we call an agency leg because statistically 1 person in every 4 deep leg will become an Executive Marketing Director. The deeper the leg the more stable your business becomes because the agent at the bottom of the leg helps retain the person at the top.

### Law 3

#### **Always Work From The Bottom Of The Leg**

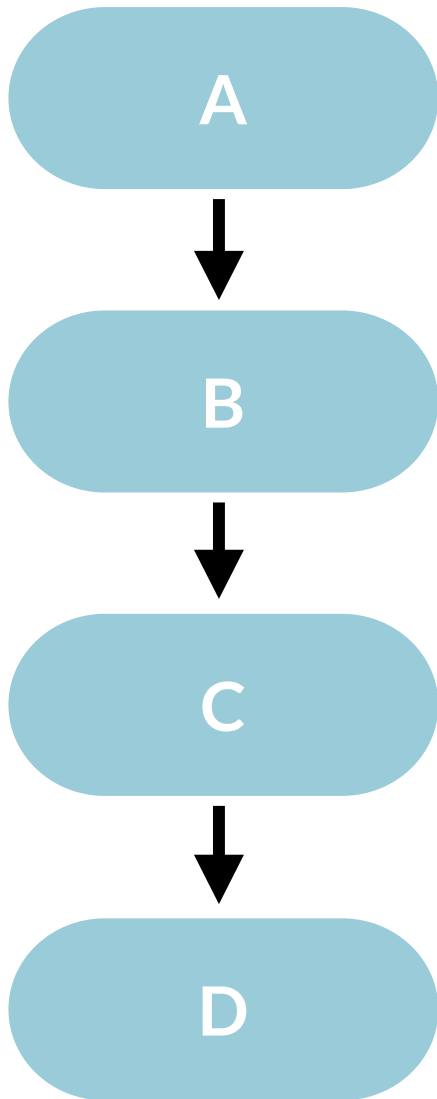
This Building Law indicates that if you work from the bottom of the leg it will help retain and keep the agents above them because by quitting they now have something to lose. It also helps everyone above them get promoted because the agent at the bottom of the legs production, licenses, and recruits also counts towards all agents above them & their promotions.

### Law 4

#### **Never Give Control Of A Leg To Someone That Doesn't Know How To Execute The First 3 Laws Of Building**

This Building Law indicates that you should never allow someone who doesn't understand, or know how to implement the laws of building to lead the leg. A leg that stops being Taprooted will eventually fizzle out which is counter productive to all the work you did to create it.

# Laws Of Building Taprooting Example



## Laws Of Building Applied

### Law 1:

A Recruit Is Not A Recruit Until They Have A Recruit

### Law 2:

A Leg Is Not A Leg Until It's 4 Deep

### Law 3:

Always Work From The Bottom Of A Leg Because The Success Of The Agent At The Bottom Contributes To The Success Of All Agents Above Them

### Example:

If You Are Working With "D", Everything "D" Does Counts For A, B, & C. So The Best Way To Retain A, B, & C Is To Help "D" Win.

### Reminder:

Never Give Control Of A Leg To Someone That Doesn't Know How To Execute The First 3 Laws Of Building.

# The Law of Big Numbers

People are unpredictable in small numbers but very predictable in large numbers. Meaning, if you are willing to run large numbers then your business becomes very predictable. Below you will find some of the numbers that are important to know and understand in order to create a predictable business.

1)

## **100 - 60 - 30 - 10**

If you call 100 People, 60 of them will set up an appointment, 30 of them will actually show up, and 10 of them will become an agent of GFI. This is why we want to gather a top 100 potential business partner list from every new agent in the Onboarding 2. If executed properly, every Onboarding 2 should lead to 10 new business partners minimum.

2)

## **10 = 2**

In every business there are 80%ers and 20%ers. 20%ers are those who are the most serious and demonstrate that through their actions. One of those actions being they get signed off as a Certified Field Trainer. On Average, 2 out of every 10 recruits will become a Certified Field trainer. So if you want to grow the size of your independent sales force, then we must run large numbers in order to do so.

3)

## **50 = 1**

The goal of every Base Shop should be to create an EMD factory. But before you run an EMD factory you must first run an MD factory. On average 1 out of every 50 recruits will get promoted to Marketing Director. So if you want to create an MD factory, it will require you selling out to recruiting in high volume.

4)

## **1 MD = 200,000 Net Points**

On average for every 1 Marketing Director you have in your team, your business will do an additional 200,000 Points per year. So if you want to run a 1,000,000 Point Base Shop, which is the minimum standard of an EMD. Promoting 5 Marketing Directors will insure you do so.

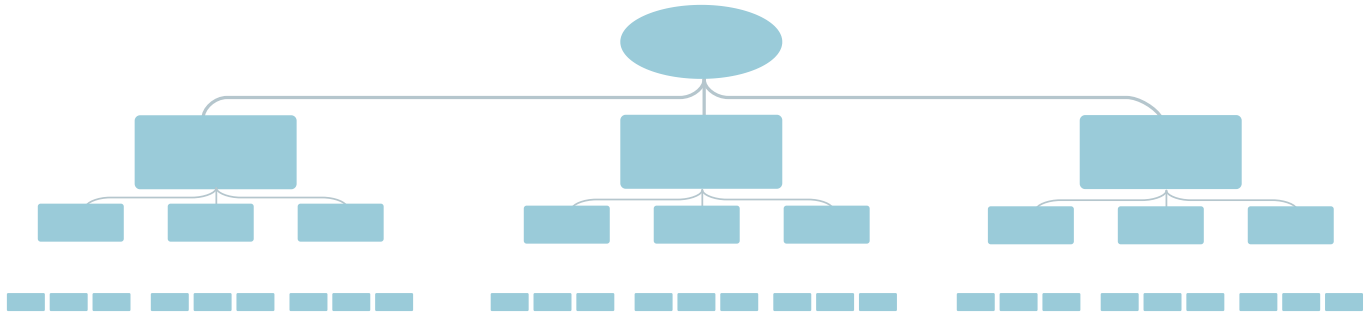
5)

## **100 = 1**

On average 1 in every 100 recruits will go on to become an EMD and \$100,000+ Ring earner in your business. And on average, every direct ring earner will generate you about \$100,000 in annual income. This means that for every 100 recruits, you can expect to grow your annual income by \$100,000 per year. So if you want to make \$1,000,000 per year in income, then you will need to recruit 1,000 people, and this should lead to 10 direct \$100,000 ring earners, which should generate you that income.

# Building In 3's

Not everyone has the confidence and believes that they can build a big agency. But, almost everybody believes that they can add 3 directs. If understood, this is the simplest way to scale your agency. This is also why the Field Associate promotion was created (3-3-60). To drive systematic, promotion oriented growth, while everyone feels like they can do it.



*Below you will find an example of how large your team would be if every agent grew by 3 direct business partners, 7 generations deep. By the end of the 7th generation you would have over 3,267 agents in your downline.*

3 Business Partners Added



If All Agents Add  
3 Directs Each

9 Business Partners Added  
(12 Total In Team)



If All Agents Add  
3 Directs Each

27 Business Partners Added  
(39 Total In Team)



If All Agents Add  
3 Directs Each

81 Business Partners Added  
(108 Total In Team)



If All Agents Add  
3 Directs Each

243 Business Partners Added  
(351 Total In Team)



If All Agents Add  
3 Directs Each

729 Business Partners Added  
(1,080 Total In Team)



If All Agents Add  
3 Directs Each

2,187 Business Partners Added  
(3,267 Total In Team)

# Business Ratios

## Net Point Ratio (Persistency)

Net Point Ratio is the percentage of points that stay in-force compared to the amount of points submitted.

$\text{Net Points} \div \text{Gross Points} = \text{NPR} \%$

**Standard:** 95% Or Higher

## Recruit To Client Ratio

Recruit To Client Ratio is the percentage of new recruits that become clients.

$7 \text{ Clients} \div 10 \text{ Recruits} = 70\% \text{ RCR}$

**Standard:** 70% Or Higher

**Goal:** 100% RCR

## Net Licensing Ratio

Net Licensing Ratio is the percentage of new licenses that make their first \$1,000 within their first 90 days in business.

$8 \text{ Net Licenses} \div 10 \text{ Licenses} = 80\% \text{ NLR}$

**Standard:** 80% NLR Or Higher

## Recruit To Taproot Ratio

Recruit To Taproot Ratio is the percentage of direct recruits that become 4 agent codes deep in one leg.

$4 \text{ Four Deep Legs} \div 10 \text{ Directs} = 40\% \text{ RTR}$

**Worst Case:** 1 in 4 Directs

**Standard:** 2 in 4 Directs

## Recruit To Net Points Ratio

Recruit To Net Point Ratio is the amount of points you average per recruit.

$10,000 \text{ Points} \div 2 \text{ Recruits} = 5,000 \text{ RNPR}$

**Worst Case:** 4,000 Points Per Recruit

**Standard:** 5,000 Points Per Recruit

## Licensing Ratio

Licensing Ratio is the percentage of new agents that get licensed and appointed.

$5 \text{ Licenses} \div 10 \text{ Recruits} = 50\% \text{ LR}$

**Worst Case:** 35% LR

**Standard:** 50% LR or Higher

## Points Per License Ratio

Points Per License Ratio is the amount of annual points you average per licensed agent in your downline agency.

$120,000 \text{ Points} \div 4 \text{ Licenses} = 30,000 \text{ PPLR}$

**Worst Case:** 20,000 Points Per License

**Goal:** 30,000 Points Per License or Higher

## Closing Ratio

Closing Ratio is the percentage of clients that move forward with you compared to the amount of appointments you go on.

$7 \text{ Clients} \div 10 \text{ Appointments} = 70\% \text{ CR}$

**Standard:** 70% CR or Higher

# Growing Your Recruiting

## Double Digit Recruiting

Every month it is important that your base shop does a minimum of 10 recruits otherwise, known as "Double Digit Recruiting". 10 Recruits is where productivity begins, but remember that both 10 recruits and 99 recruits are considered DDR which means that even though 10 is good start, it is not enough volume to get you to the promised land.

Because developing leaders takes time, it is a lot easier to run high recruiting volume and find leaders, than it is to develop them from scratch. If you find someone who is already influential, now all you have to do is teach them the skillset because influence takes time to develop and must be caught while skill sets can be taught.

Typically 10 = 2. This means that for every 10 recruits, 2 of them will go on to become a certified field trainer and the person with the most independent and producing field trainers will do not only the most production, but the most consistent production.

10 Recruits Per Month = Momentum Starts  
25 Recruits Per Month = The Magic Starts to Happen  
100 Recruits Per Month = You Wont Recognize Your Life

### **1 5 Directs Three Months In Row**

In order to kick start your Base Shop, the best way to do it is to do 5 directs, 3 months in a row and then properly run them through the system.

### **2 Master The Onboarding 2**

The Onboarding 2 is designed to generate a top 100 potential business partner list and is where the future of your Base Shops recruiting comes from. Based off the 10-6-3-1 "Call to Result" ratio, 100 names and numbers should lead to a minimum of 10 new recruits. So if we master the art of getting a big list in Onboarding 2, our recruiting will always remain high.

### **3 Only MDs & Above Do Onboarding 2**

If Onboarding 2 is where all future business volume is coming from then it is important that we take it very seriously and not allow just anyone to do it. Only allow MDs and above to do an Onboarding 2. If your Base Shop is doing less than 25 recruits per month, then the EMD should be doing every Onboarding 2 until volume picks up.

### **4 Dedicate 1 Base Shop Call Per Week To Recruiting & Building**

Whatever you talk about or train on your Base Shop leaves thinking about. So dedicate one call per week to teaching people why and how to recruit and by doing this recruiting will become the dominating thought the next couple of days

### **5 Power Hour**

Every day run an hour long zoom where you and other full timers get on a zoom call or in person and dedicate 1 hour straight to recruiting outreach.

### **6 Teach The "How" Not Just The Why**

In the recruiting manual you can find over 12 different step by step, word for word strategies to get directs. Make sure that your Base Shop is fully equipped on exactly what to do and how to do it.

### **7 Recognize It & Leverage The Field Associate Promotion**

Always recognize and highlight what you want more of. Every week on your Base Shop call, make sure to recognize everyone who got a direct in the last 7 days along with the month to date direct recruiting numbers. Doing this while also talking about and recognizing the Field Associate promotion (which requires 3 personal directs), will keep people motivated to continue recruiting.

# Growing Your Recruiting

## Onboarding 2 Tips

1

Only EMDs and above should be conducting the Onboarding 2. If a Base Shop is doing more than 25 recruits a month, we recommend that the EMD allows qualified MD's to conduct the Onboarding 2 as well. But as the EMD, I would still meet for at least 30 minutes, every new agent that comes into the business (EMD Meet & Greet).

2

When explaining compensation that comes from building an agency, be careful not to explain it in a way where it sounds like you are profiting on others (integrity driven people will not feel comfortable with this). Instead, explain it in a way that demonstrates that we are helping them, not profiting on them.

### Example:

"Mrs. Agent, if we helped you earn an extra \$2,700 dollars per week around your schedule, how big of a difference would that make in your life and what would you use it for?"

They Explain...

And if we helped you do that for your family how amazing would that feel? That would be incredible right? So imagine how good it would feel to help someone else do that for them and their family. That would be super fulfilling, wouldn't it?

Well guess what, if you help 6 agents do this for them and their family, not only will that make a huge difference in their life, but because you were a blessing to them, you also get blessed with what we call Agency Income, which would generate you an extra \$14,400 per week, and none of that money comes out of their pocket. Thats incredible isn't it?"

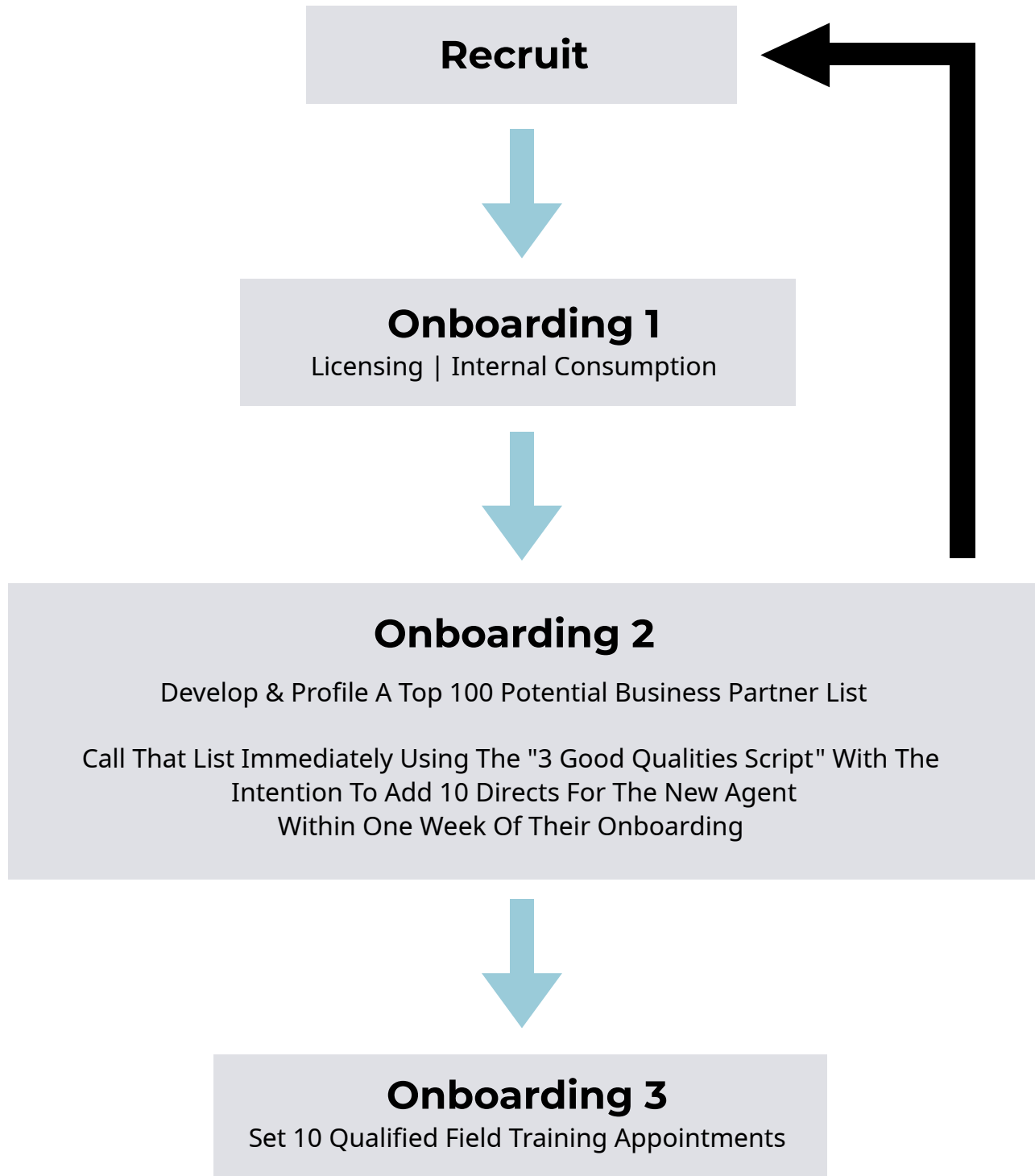
3

Make sure they can explain back to you how to earn their Field Associate promotion. If they are clear on how, there is a higher likelihood that they will do the 3 directs that is required to be promoted. Also, make sure that you get their commitment with a date that they will complete their promotion by. This will help create urgency in their wanting to recruit because it needs to be completed by a specific date.

# System Recruiting Flow

If the system is being run correctly, the system should always produce more recruiting volume.

Recruits go into the system, and the system generates more recruits.



# Growing Your Licensing

## Double Digit Licensing

Everyone always talks about double digit recruiting, but very few talk about Double Digit Licensing, which is way more important than DDR. You obviously can't license someone without recruiting them, but do not mistake what truly grows your business. The person with the largest licensed and trained field force will always win. Volume always trumps skill, when skill doesn't have volume.

### **1 Licensing Should Be In Every & All Conversations**

Talk about licensing non stop, and make sure that there is never a conversation where licensing doesn't get brought up.

### **2 Make Sure Your CFTs Are Equipped**

It is the licensing coordinators job to help them through licensing, but it is the EMD and Certified Field Trainer's job to motivate them through the process and hold them accountable.

### **3 Strong Licensing Support Staff With Incentives**

Licensing is not something that just anyone should do. You want someone in the role that is super structured, action oriented, and actually cares about getting people licensed and paid. We would recommend adding some sort of bonus incentive to their pay for every new person they get appointed. If there is a financial incentive your staff is likely to do more.

### **4 Put It In Your Base Shop Announcements**

The more people see it and hear about it, the more they will be thinking about it. We recommend adding licensing to your weekly base shop announcements so you don't forget to talk about it.

### **5 Recognize It**

Always recognize what you want more. We recommend having fliers made for the group chats and celebrating each person on your base shop call every week. We suggest recognizing not just those who pass their exam, but those who get fully appointed.

### **6 Licensing Classes**

We recommend holding 2 licensing classes per day (Example: 11am & 4pm) Monday - Friday. Then, an additional class at 11am every Saturday that helps each agent get into their study courses, learn how to study, Then in that class, make sure that a test date is scheduled (If the state permits). There is nothing wrong with multiple base shops coming together to run this.

### **7 Non Licensed Agent Group Chat**

Have a Group Chat with your licensing coordinators and every person going through licensing. This allows for agents that are studying to get answers to questions quickly, it allows for agents to create relationships and set up study groups where they can study together, and it also helps with motivating those in licensing through the process.

### **8 Make Sure People Pass Fast**

Create a culture in your team where everyone expects to take and pass the licensing exam in less than 7 days, worst case scenario 10 days. What ever you talk about as normal will become normal, so make this normal language amongst the trainers, the coordinators, and then obviously for yourself as the leader.

# Scale Your Licensing

You can mathematically scale and grow your income by understanding how important licensing is and how it affects your cash flow.

This is why we MUST obsess over not only licensing in volume, but also having a strong licensing ratio (50% Minimum).

**1 License = 30,000 Points Per Year**

**10 Licenses = 300,000 Points Per Year**

**100 Licenses = 3,000,000 Points Per Year**

**1,000 Licenses = 30,000,000 Points Per Year**

**10,000 Licenses = 300,000,000 Points Per Year**

## **Licensing Income Math:**

If You Add 10 Licensed Agents To Your Agency This Month, That Means That You Can Expect An Extra 300,000 Points In Your Agency Over The Next 12 Months

At A 35% Average Override Spread, You Can Expect An Additional \$105,000 In Override Income Over The Next 12 Months

Every 10 New Licenses = \$105,000 Increase In Your Annual Override Income

If You Do That Every Month For 12 Months, You Can Generally Expect To Be Earning \$1,260,000 Per Year Overriding Your Base Shop

# Increasing Points Per License

## 30,000 Points Per License Is The Minimum Standard

For every 1 licensed agent in your agency, you should do 30,000 points per year. This is a very important metric to track and measure because by improving it, you improve your annual production, which means you improve your passive income. Let's say you have 100 Licensed agents and you are averaging 30,000 points per license. This means your agency is doing 3,000,000 points per year. If you improve your points per license by 15,000 points, this means you will do an additional 1,500,000 points per year, which at a 30% average override, will pay you an extra \$450,000 in income per year.

### 1 **Recruit & Field Train In The Right Market**

If you recruit people in the right market, when they complete their internal consumption, the premiums are higher because they actually need and can afford our services. If you Field Train agents in the right market, then the premiums are higher for the same reason. So the better the markets, the higher quality clientele you are going to have. This leads to higher premiums, higher insurable needs, and higher rollover dollar amounts.

### 2 **Multiple Policies Per Household**

As an EMD, we need to train our agents to make sure that each client has the 5 Finger Solution. By adding a Term LB to every IUL, or adding a Final Expense policy to every rollover client, or making sure each client has the best of all worlds with all the products, you can add an extra couple thousand points per family helped and easily cross 5,000 points per recruit.

### 3 **GFI Rocket**

After using GFI Rocket and a client clearly seeing the power of our products, you will no longer get the question "what's the least I can put into this account". You will instead get the question, "what's the most I can fund and dump into this account". GFI Rocket will usually double your average premium, so make sure that you and your agents are fully equipped on how to use it.

### 4 **Competent Certified Field Trainers**

Most agents rent information rather than owning information, meaning that they repeat words they hear others say without doing the due diligence on their own, to truly be knowledgeable. The more your trainers understand how the products work, the more confident and convicted they become. This leads to people taking action and getting results.

### 5 **Passionate Certified Field Trainers**

Those who believe will be believed and those who are convinced will be convincing. So if we can help our agents become crusaders, then their conviction goes up and a big part of CloZing is determined by the conviction of an agent and how much they truly believe that what they are doing for a client is the best thing for them.

### 6 **Internal Consumption**

Regardless of whether or not a new recruit stays an agent of the firm, we need to have the goal that every recruit becomes a client. (if suitable) So no matter what, within 72 hours of someone getting coded with GFI, we need to make sure that we do a full financial review with them and their spouse. If for some reason they quit, still call them and set it up. There should be no such thing as a "recruit", only "recruit clients", because every recruit should strongly consider being a client.

### 7 **Weekly Base Shop Product Call**

Every week you should do a product and crusade oriented Base Shop call. Not only will this instill the crusade and competence into your agents, but it will also indirectly sell each agent on possibly becoming a client if they haven't.

# Net Licensing

## 100% Net Licensing Ratio

If you are going to spend time, energy, and money to help someone get licensed, wouldn't it make sense for that license to stay? OF COURSE! On average a Net License will generate activity in your business for a minimum of 18 to 24 months. On average, 1 out of every 4 Net Licenses will usually go on to make a minimum of 6 figures. This is why Net Licensing is so important. There is your gross licenses, which is the amount of licenses you get. Then there is your net licenses, which is the amount of licenses you keep.

### **1 Build Them An Agency**

Build them an agency prior to them getting a license so by the time they get licensed, they have bunch of downline agents. The recommended consumption from their downlines will role up to them as the next available payable license.

### **2 Make Sure They Understand Why It's Important**

If an agent knows why it's important, but also that we track it because it's important, then a higher level of value get's placed on the milestone itself.

### **3 Make Sure They Are Clear On What's Needed**

If an agent doesn't know what's required to become a Net License, then they can't take intentional actions in order to accomplish it. This means the chances of it getting done, becomes slim.

Associate = \$300 in personal premium

Field Associate = \$200 in personal premium

### **4 Strong Onboarding 3**

In the Onboarding 3, we profile a top 25 field training list, role play the Field Training Script and common questions until they can't get it wrong. Then we set up 10 Field Trainings immediately right there on the spot. If we make sure that we do not end Onboarding 3 until at least 5 Field Training appointments are on the calendar, then helping the new agent become a Net License should become simple.

### **5 Control The List & Market**

When profiling the Field Training list, it important to control the quality of people that go on the list. We have all heard the term MACHO (Married, Age 28+, Children, Home owner, Occupation) and it is important that we book appointments in a MACHO market. When doing the field training appointments, make sure at least 5 of them are above the age of 50 so you are tapping into a rollover market.

### **6 Recognize It**

Always recognize what you want more of. When someone becomes a Net License, make sure to have a flyer made and posted in your group chat, and also make sure they get recognized on your weekly Base Shop call.

### **7 Quality Certified Field Trainers**

The better the trainers, the easier it becomes for them to control the field training list, and the easier it becomes for them to get a result in the new agent's market. If a Certified Field Trainer can't cloZe, then they wont help any clients, which is needed for the new agent to become a Net License.

### **8 Incentivize It**

For anyone that becomes a Net License, add some sort of incentive. The company recognition system recommends buying them a GFI polo and hat, similar to what a professional athlete gets when they make the team. It is a way to make them feel special, but also a way to inspire others to want to do the same.

# Recruit To Net Point Ratio

## 5,000 Points Per Recruit Is The Standard

For every 1 person that you recruit into your agency you should generate a minimum of 5,000 points. This is one of the fastest ways to double or triple your production and income over night. If your Recruit to Net Point Ratio is 2,500 points per recruit and you get it to 5,000, then not only does your production double but so does your income.

### **1 Recruit & Field Train In The Right Market**

If you recruit people in the right market, when they complete their internal consumption, the premiums are higher because they actually need and can afford our services. If you Field Train agents in the right market, then the premiums are higher for the same reason. So the better the markets, the higher quality clientele you are going to have. This leads to higher premiums, higher insurable needs, and higher rollover dollar amounts.

### **2 Multiple Policies Per Household**

As an EMD, we need to train our agents to make sure that each client has the 5 Finger Solution. By adding a Term LB to every IUL, or adding a Final Expense policy to every rollover client, or making sure each client has the best of all worlds with all the products, you can add an extra couple thousand points per family helped and easily cross 5,000 points per recruit.

### **3 GFI Rocket**

After using GFI Rocket and a client clearly seeing the power of our products, you will no longer get the question "what's the least I can put into this account?". You will instead get the question, "what's the most I can fund and dump into this account?". GFI Rocket will usually double your average premium, so make sure that you and your agents are fully equipped on how to use it.

### **4 Competent Certified Field Trainers**

Most agents rent information rather than owning information, meaning that they repeat words they hear others say without doing the due diligence on their own, to truly be knowledgeable. The more your trainers understand how the products work, the more confident and convicted they become. This leads to people taking action and getting results.

### **5 Passionate Certified Field Trainers**

Those who believe will be believed and those who are convinced will be convincing. So if we can help our agents become crusaders, then their conviction goes up and a big part of CloZing is determined by the conviction of an agent and how much they truly believe that what they are doing for a client is the best thing for them.

### **6 Internal Consumption**

Regardless of whether or not a new recruit stays an agent of the firm, we need to have the goal that every recruit becomes a client. (if suitable) So no matter what, within 72 hours of someone getting coded with GFI, we need to make sure that we do a full financial review with them and their spouse. If for some reason they quit, still call them and set it up. There should be no such thing as a "recruit", only "recruit clients", because every recruit should strongly consider being a client.

### **7 Weekly Base Shop Product Call**

Every week you should do a product and crusade oriented Base Shop call. Not only will this instill the crusade and competence into your agents, but it will also indirectly sell each agent on possibly becoming a client if they haven't.



# The 7 C's To A Successful Recruiting Interview

C 1

## **Connect**

It is important to find things in common and connect in order to establish trust.

C 2

## **Credibility**

Be sure to establish credibility in GFI so they can see that we are a company they can have confidence working with. You can do this by leveraging our credibility slide and the relationships we have with some of the largest brand names in the financial industry (Non Captive). It's also important to build credibility in yourself so they take you more seriously. So be sure to have the Trainee edify you and be sure to edify yourself.

C 3

## **Crusade**

People don't care what you do until they know why you do it. It's important that we share with people our crusade as a company and the difference we are making in families lives, along with your personal crusade of why what we do matters so much to you. This allows them to see that yes we make a lot of money here, but our hearts are in a great place and we are making a huge difference.

C 4

## **Concepts**

Give them a taste of what we do, but don't go over everything we do. The financial industry can be intimidating so it's important that we keep things simple enough that people think that they can do it.

it is also very important that they can see the need for what we are offering. If they think that "everyone needs this" then the chances of them moving forward increases.

C 5

## **Character (Integrity)**

It is important that people understand that we believe in doing the right thing and that we are good people. This will also remove skepticism because good people don't take advantage of people.

C 6

## **Compensation**

Take the time to truly understand how our compensation works so you can clearly explain it. It's important for people to know not just what we get paid, but how we get paid. The more dramatic you are the less they will believe you, so keep it simple and logical.

C 7

## **Close**

Don't give it away, take it away. If you make it seem as if you are trying to convince someone to join GFI, you will lose leverage. Utilize the closing questions at the end of the provided recruiting interview.

# Recruiting Interview Tips

## There Is An Art To It

### Tip 1

#### **Don't Give It Away, Take it Away**

Say things like:

"If we decided to move forward with you"

"Let's say you qualified to work with us"

### Tip 2

#### **Be Assertive & Confident, But Likable**

It is important to make sure that you stay in control of the conversation while remaining likable. If you are too friendly, you either won't be taken seriously or will get friend zoned where you lose the authority over the conversation.

Remember, you are interviewing them, not trying to convince them. But remember, you have to remain nice and likable or else they won't want to be led by you or see you every day.

### Tip 3

#### **Find Out What People Want & What Is Important To them, & Then Make GFI The Solution**

The start of the recruiting interview is filled with questions that will help you identify what the potential recruits dreams and goals are, what they are and are not looking for in a new opportunity, and what their human needs are (6 human needs). So, if we identify what matters most to them, & then make GFI the solution to getting what they want, then recruiting becomes easy.

### Tip 4

#### **More Than 87% Of Americans Are Looking For Something Better & Would Switch Careers If They Found It**

This means that if someone shows up to an interview with you and doesn't move forward, then something you did or said is the reason they didn't move forward. So don't be so quick to point blame, be willing to audit yourself and your abilities to improve your ratios and skillsets as you meet with more prospects.

# Recruiting Interview Questions

## **Build Social Proof**

Hey NAME, how's it going? (small talk)...Well I have been interviewing candidates all day so it's been super busy.....and since we only have about 30-45 min here, and I do have another zoom booked right after you...do you mind if we get right into it?

## **Set Agenda**

"So how these meetings usually go is I'll ask you a few questions just to see if we're a good fit to work together...I'll break down for you in more detail what we do, how we help people, compensation, etc...and then if I think we're a good fit...I'll let you know what we have to offer, and what the next steps are for onboarding... Does that Sound good?

## **Question 1: Find Motivation**

So, with that being said...my first question to you NAME is...what really drove you to take the time out of your day and hop on this zoom with me?

## **Question 2: Look For Their 6 Human Needs**

Ok Great! So in the next venture you potentially take on, whether full time or one on the side, what are some things that are important to you?

Like:

Are you looking to have more time with your family?

Grow personally and professionally?

Are you looking to make more money?

Do you want to be apart of a winning team?

Do you want something that can challenge you?

Work remotely and control your schedule?

Own your own business?

Do you just want to help people?

What's important to you?

## **Question 3: Gage Seriousness**

Perfect. So I'll ask you very directly. If we could help you achieve those goals...sooner rather than later...it didn't interfere with what you do now...and it made sense personally, professionally, and financially...How serious would you take the position?

## **Question 4: Get Them Dreaming**

So we are obviously in the financial industry which is the highest compensated industry in the world, so if we decided to move forward with you and you got to a place where you became financially free.... What would you want your life to look like and is there someone that means the world to you that you would like to be in a position to take care of?

## **Question 5: The Bigger The Number The Better**

What do you think you would need to earn annually to support a life like that?

## **Question 6: They Tell You Their Dreams Can't Be Accomplished At Their Job**

In your current career or on your current path, how long would it take for you to earn an income like that? Or would it not be possible at all?

# Recruiting Interview Questions

## Question 7:

Well, I got one last question before we dive into things here NAME...

So, If we fast forward to the end of this interview... we decide that you are a good fit and the feeling was mutual, and we could train you to help families & earn an income like that in the next 1-3 years, and it made sense both personally and professionally.

Is there any reason why you wouldn't be able to pass a background check... and is there any reason you wouldn't be able to pass a state license test in the next week or 2... It's kind of like getting a real estate license but easier & it's only a couple hundred bucks, depending on the state that you are in.

So, is there any reason why you wouldn't be able to get that done?

\*They tell you\*

Excellent. Well then let's get started...



# Understanding Why People Quit

If we can understand what causes people to quit then we can proactively take the steps necessary in order to keep them.

1

## **They Don't Feel Like They Can Do It**

People will quit when they no longer feel like they can succeed or when their dream no longer feels attainable. This is why it's so important to not only get every agent a result quickly, but also help them become extremely skillful fast where they begin to have the confidence that they can get a result. This is why role playing is so important because it's a fast way to transfer skill. We recommend to practice until you can't get something wrong, rather than practicing until you get it right.

2

## **They Don't Feel Like They Belong**

It's important to help get every agent immersed into the environment and the team because if they feel like they are on the outside they will quit the same way you would leave a party where you didn't know anyone or feel welcomed at.

Make Sure To:

1. Get them introduced to others in the team, preferably people that come from a similar background.
2. Get them results quickly so you can recognize them publicly where they can start to feel seen.
3. Create graduating classes of people that are going through the same stages of the system / licensing together, so that way they don't feel alone.
4. Build a strong personal connection.
5. Allow them to introduce themselves on maybe a smaller call, so they feel welcomed.

3

## **An Unskilled Or Bad Trainer**

Often times people want to blame the new agent as not being "ambitious" or "uncoachable" when in reality, the trainer is just not good enough to inspire them to take action or move forward. We need to make sure we sign off strong trainers or make sure that we are heavily involved, until we can truly trust their ability to do things on their own. There is no such thing as perfect, but we must strive for excellence.

# The 4 R's To Retention

It's not about how many you recruit but how many you actually retain. In GFI we don't recruit to replace, we recruit to find, keep and develop leaders. Below you will find actions that you can intentionally take to ensure that it happens.

R

## **Recruit**

---

Every Base Shop should strive to do a minimum of 25 recruits per month. If you are properly running the system, that should become easy. Our minimum standard of excellence should be 10 recruits per month.

R

## **Result**

---

The moment you recruit someone, it is imperative that we get them a RESULT right away so that way they see that this works. Building a relationship isn't enough. If they do not feel like they can win, then they won't try at all. Get them Licensed, Promoted, Spousal Support, a direct, etc. Strive to do this Immediately.

R

## **Relationship**

---

People quit on strangers and people quit on acquaintances. It becomes a lot harder to quit on a friend, those that become family and someone that has done a lot for you. This is why we want to build a strong connection with our agent immediately. Genuinely get to know them, their family, what they love to do, what drives them, their why and if you live close by, try to do something in person or outside of the office together. Relationships are not built on zoom or in the office, but at game night, on hikes, having dinner in your home, going to the gym or doing something together that you have in common.

R


## **Retain**

---

If you follow the steps above, it becomes easier to retain and keep your agents but just remember...Your ambition might get people through the door, but your character and integrity is what will keep people here. Always do the right thing, treat people with respect, don't talk down on others and never do anything that will affect someone's income and or family in a negative way. This doesn't mean you will always agree with everyone, but there is always a solution to all people problems...You just have to find it.

# Building An Agency

## Things You Should Know

- 
- A)** Width = Wealth; The Person Who Adds The Most Personal Directs Will Most Likely Have The Most 4 Deep Legs, And The Person With The Most 4 Deep Legs Will Find The Most Leaders
- B)** Agent Count = App Count: The Amount Of Agents You Have Showing Up To Every Call = The Amount Of Clients You Will Help Each Month; More Agents = More Families Helped = Higher Income
- C)** The Size Of Your Team Is In Direct Proportion To Your Ability To Lead It (Small Team = Small Leadership Abilities. Big Team = Big Leadership Abilities. Good News: All Abilities Can Be Learned)
- D)** Your Income Is In Direct Proportion To The Value That You Bring To The Marketplace. If You Grow Your Value As A Leader In This Business, Then More People Will Want To Learn From You And Listen To What You Have To Say. The More People You Having Learning And Listening To You The More Valuable You Become To the Marketplace
- E)** You Can't Override An Agent Who Is Not Licensed And Getting Paid. So If You Help Others Get To Where They Want To Be, Then You Will Get To Where You Want To Be
- F)** When People Are Down, Encourage Them! When People Are Up, Congratulate Them, And Then Challenge Them To Get To Their Next Level
- G)** If You Help Your Leadership Hit Their Promotion And Help Your Team Hit Their Promotion Then By Default You Will Always Hit Your Promotion
- H)** Your Work Ethic And Your Ambition Will Determine How Fast, And How Big You Build This Business. But Your Integrity And Strength In Character Will Determine Whether or Not You can keep It
- I)** You Must Have A Big Vision Or Participate In Your Leaderships Vision Because Where There Is No Vision The People Will Perish
- J)** Learn The Language Of Building: Helping People / Creating A Better Life For You And Your Family / Selling The Dream/ EPR: Encourage, Praise, Recognize
- L)** Help Create Competition In your Team Because competition Drives Performance. Just Make Sure You Don't Create Combativeness

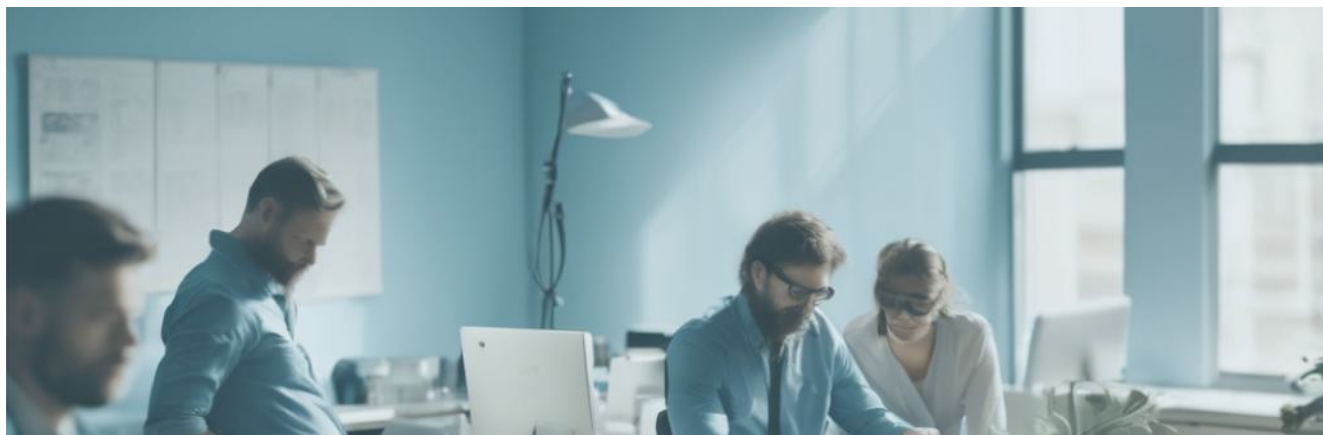
# Building An Agency

## Recruiting Tips


- 1.** Don't Give It Away, Take It Away; People Want What They Can't Have
- 2.** Say Things Like "I Don't Know If You Would Qualify". "I'll See If I Can Get You An Interview". "I Can't Guarantee Anything". "My Trainer Is Super Busy And Highly Respected, So Please Don't Make Me Look Bad"
- 3.** Lead With Fulfillment, Helping People, And An Amazing Environment, And Then Make Money The Byproduct. "It's Just So Fulfilling, I Feel Amazing About What I'm Doing For Clients, The Culture And People I Work With Are Amazing And So Supportive, And To Be Transparent I've Never Seen Compensation Like This Before, It's Been Incredible"
- 4.** It's Not About Where You Are But Where You Are Going. "With What I've Got Working, I'm Going To Make \$250,000 This Year". At First It May Seem Unrealistic, But Know It's An Affirmation!
- 5.** Strategically Leverage People Who Have Things In Common With The Prospect Such As Careers, Age, Ethnicity, Gender, Sports, Geographic Location, etc. The More they Have In Common The Easier It Is To Build Trust
- 6.** Make Sure You Don't Come Across As If Anyone Can Work With Us (Because They Can't). If You Make It Seem That Way Then Our Platform Loses Value
- 7.** People Buy You, Your Belief, Your Passion, And Your Conviction In What We Do. The Most Passionate & Confident Person Will Be The Most Influential
- 8.** You Don't need to Be "The Person", Leverage Others In Order To Help You Recruit Top Talent. A 7 Can't Recruit An 8 But They Can Leverage A 9 To Help Them

# Good Words **Vs.** Bad Words

## Recruiting Tips



Bad Words	Good Words
Are You Saying The Wrong Things?	
My "Recruit"	One Of Our "Agents" or "Business Partner"
My "Upline"	This Is My "Mentor" or "Trainer"
My "Downline"	Business Partner / Agent / Associate
Commission	Compensation
Recruiting	Building An Agency
Selling	Helping families
My "Team"	My "Financial Agency"
"We sell life insurance"	"We help families accumulate wealth & increase their net worth"
"You can make a lot of money"	"You could do very well for yourself financially"



"The true identity of an entrepreneur  
is revealed by their volume"



## Close Friend Method 1

When it comes to recruiting someone close to you, there are 2 main methods that you can use...

### 1. IF YOU THINK THEY WOULD BE OPEN TO AN OPPORTUNITY

2. Use the referral text and then have a trainer call in order to set an interview using the 3 good quality script

#### REFERRAL TEXT:

Hey (NAME)! Not sure if I told you or not but I just took a part time position with a financial firm and one of the executives asked me if I knew anyone that was hard working, had great people skills, and strong integrity and I mentioned you. If you're interested, great, and if not, it's no big deal. But it's super fulfilling and the income is great too. Be on the lookout for a call from a (TRAINER) and they can answer any questions you might have!

#### TRAINER SCRIPT:

"Hello, may I speak to (NAME)? How is it going (NAME) my name is (TRAINER) and your good friend \_\_\_\_\_ referred you to us, do you know \_\_\_\_\_? Excellent. Well I'm not sure if he told you or not but he recently took a position with our firm and we have been super impressed, so we asked him if he knew anyone that he thought could be a great fit and he thought of you. (TRAINEE) said that you were \_\_\_\_\_, \_\_\_\_\_, and \_\_\_\_\_, are these great things true about you? Well that's good to hear. I really like (TRAINEE) and know he's not the type of person that would just refer anyone over to us so based off his recommendation we wanted to set up an interview with you in the next day or so to get to know you more and give more clarity on the positions to see if it's a good fit. What does your schedule look like tomorrow?"

#### SCHEDULE APPOINTMENT

##### NOTE:

If for some reason they are not interested, set up a Field Training with them.

"I understand completely, and congratulations on finding a career that you love. I know that you aren't looking to change careers, and that's perfectly fine, but (TRAINEE) is actually going through our training process that requires him to complete 10 support zoom calls to learn how to represent our firm. Because he said so many great things about you, I'm assuming you are good friends, is that correct? Would you be willing to help support (TRAINEE) with one of his zoom support calls? It's only 30 minutes and to gain support since this is a new industry for (TRAINEE).

#### SCHEDULE APPOINTMENT



## Close Friend Method 2

1. IF YOU THINK THEY WOULD BE A GREAT FIT BUT WOULDN'T BE OPEN TO AN INTERVIEW
2. Use the Field Training Script to set up a field training, and then let your trainer know that you think they would be open to the business if they actually saw it. This way your trainer can break down the business as well for them and then worst case you will at least get a client.

### FIELD TRAINING SCRIPT

**You:**

"Hey \_\_\_\_\_, How are you? Well the reason i'm calling is because i'm super excited. I just took a position with one of the top financial firms in North America, Global Financial Impact. I'm going through training, and your support would mean the world to me, so I was wondering if you and (wife/ husband) could help me with a quick zoom training in the next couple of days?"

**Them:**

"Of course, what do we need to do?"

**You:**

"It's on zoom, takes about 30 minutes. And my trainer is just going to be sharing with you what i'll be doing so I can learn, but also, so I can gain support & encouragement from the people that matter the most to me. So would tomorrow or the next day work better for you guys?"

### SCHEDULE APPOINTMENT & EDIFY TRAINERS TIME

**You:**

"Thank you again! One last thing. I'm trying to make a good impression with the Executive and am actually graded on reschedules and haven't had one yet. Can you please promise not to cancel or reschedule because it will make me look bad?"



## Business Card Recruiting Strategy

### STEP 1:

Collect business cards everywhere you go.

### STEP 2:

Call with script listed below.

"Hello, is this NAME? Hey NAME how are you? My name is \_\_\_\_\_, I am reaching out because I picked up your business card from \_\_\_\_\_. Are you still working in the \_\_\_\_\_ Industry?

Fantastic!

Well this is going to sound super strange and I don't mean to sound strange, but the reason I ask, is because I actually work with Global Financial Impact, which is the fastest growing financial firm in North America, and demand right now is through the roof, so we have been using unusual methods in order to find talent and expand.

We have actually had a lot of people come from (INDUSTRY) and do very well for themselves financially. Obviously I couldn't guarantee anything and you would obviously need more information, but are you in love with where you are at, or would you be open to other professions in addition to what you do now?"

**Them:** "I would be open."

"Well then how about we do this, how about we set up a 30 minute zoom where we can get to know you better, and see if you are the type of person that we are looking for, but then also give you more clarity on the positions to see if it is something you would be interested in. How does that sound?"

### Schedule appointment

"So NAME, I know we called you, but we are extremely busy and so if you would please make sure to be punctual, dress sharp, and be on a computer where we can have your undivided attention, that would be amazing. Does that sound good?

Fantastic, we will see you tomorrow!"



## **Business Person Strategy**

This strategy will lead to the prospect potentially referring people to you, potentially becoming an agent, or potentially becoming a client.

### **PHONE SCRIPT:**

“Hey \_\_\_\_\_ How are you? I know you’re busy and so am I, but I wanted to reach out because I think there are some ways for us to make money together or at least help each other’s businesses in one way or another.

What’s your schedule like this week where we can hop on a quick 30 minute zoom.”

### **APPOINTMENT STRUCTURE:**

1. Company credibility / Showing the companies we work with
2. \$1,000 a month illustration plugged in to GFI Rocket
3. Compensation that an agent would make helping a client save \$1,000 a month into our services
4. Franchise Model / Builders Compensation



## **Cold Market Prospecting**

### **STEP 1**

Wherever You Are, Identify A Strength In Someone And Then Walk Up To Them And Say:

### **SCRIPT**

"Excuse Me, \_\_\_\_\_. My Name Is \_\_\_\_\_. This Is Going To Sound Super Strange And I Don't Mean To Sound Strange, But I Noticed That (Insert Compliment). And Our Firm Is Expanding A Ton Right Now Looking For Good People, And If You Brought (Compliment) To Our Firm, You Can Do Very Well For Yourself Financially.

I Obviously Can't Guarantee Anything But I Would Love To Get You In Contact With Our Expansion Department. Do You Happen To Have A Business Card? No?

How About You Just Write Down Your Number, I'll Speak To The Expansion Department And If They Are Willing To Give You A Call, I'll Reach Out To You First And Let You Know.

Does That Sound Good?"

Awesome!

### **STEP 2**

Wait 48 Hours To Call. We Recommend Calling Around What You Think Their Work Schedule Would Be.

### **SCRIPT**

"Hey \_\_\_\_ How Are You? Sorry For Not Getting Back To You Sooner, The Expansion Department Got Back To Me Yesterday, But I've Been Super Slammed. Great News Though, They Said They Would Be Willing To Meet With You And Gave Me Access To Their Schedule. So What Does Your Schedule Look Like Tomorrow?"

### **Schedule The Appointment**

"By The Way, Just So You Know, I Never Do This, But I Can Just Tell You Are A Good Person And I Really Think You Could Do Great. The Executives With Us Are Extremely Busy, So Please Don't Make Me Look Bad Because I'm Going Out On A Whim For You And These Are Higher Paying Positions. So Please Dress Sharp And Make Sure You Are Punctual, Does That Sound Good?"



## Expanding My Business

This strategy will lead to the prospect potentially referring people to you, potentially becoming an agent, and potentially becoming a client.

### **SCRIPT:**

"Hey \_\_\_\_\_, how are you? (Small Talk)

Well the reason I'm calling is because I'm helping run expansion for our financial firm, and we are looking to expand In your area, and because I know everyone loves and respects you, I wanted to see if you could help me out by potentially referring me to some quality people."

**Them:** Of Course

"Thank you so much! I really appreciate you being willing to help me out, but obviously you don't know what we do. So can we hop on a quick 20 minute Zoom in the next day or so, so I can give you an idea of what we do and the type of people we are looking for? It would be awesome to catch up anyways!

So Does Tomorrow Or The Next Day Work Better?"

### **APPOINTMENT STRUCTURE:**

1. Company credibility / Showing the companies we work with
2. \$1,000 a month illustration plugged into GFI Rocket
3. Compensation that an agent would make helping a client save \$1,000 a month into our services



## Friendship Farm

Friendship farming is when you..

- A)** Call someone you know or even kind of know
- B)** Let them know we are expanding
- C)** Then describe them to themselves as what we are looking for hoping that they refer themselves.

If they don't refer themselves, typically people hangout with people who are the same age, have the same interests, and even have similar career backgrounds. So, if they don't refer themselves, there is a high likelihood that they will have a referral for you!

### **SCRIPT:**

"Hey \_\_\_\_\_, How Are You? (Small Talk) The Reason I'm Calling Is Because I'm Helping Run Expansion For Our Financial Firm And We Are Looking For People With A Background In [\(Describe Them To Them & Be Specific\)](#).

Because It's The Financial Industry The Compensation Tends To Be Higher, Normally In The Multiple 6 Figure Plus Range. There Also Would Be No Requirement To Quit What You Are Currently Doing.

So I Was Wondering If You Happen To Know Anyone That You Can Refer To Me? A Background Check Would Be Required But No Background In Finance Or Business.

So Does Anyone Come To Mind?"



## Luke Warm Market

Great for those you haven't talked to in a while whether it's through facebook, instagram, or even your contacts.

### **STEP 1**

Create a reason to reconnect:

"I was remembering that one time..." "I saw a photo of us", "your profile popped up on my feed", "How Have You Been?"

### **STEP 2**

Catch up with them

### **STEP 3**

Ask The Question:

"what are you doing for work?"

### **They Answer**

"That's Awesome, Do You Love It?" (Not **"LIKE"** but **"LOVE"**, anything outside of **"LOVE"** means that they are easily recruitable. If they say **LOVE** I would use Method 2 from the **Close Friend** recruiting script)

### **STEP 4**

"We Need To Hang Out Sometime. What's Your Number?" (If it's through text you obviously wouldn't ask for their number)

### **STEP 5**

**24 Hours Later send Them a Text:**

"It Was Great Talking To You, I Look Forward To Hanging Out Soon"

### **STEP 6**

48 hours later, send them a referral text or call using the script found on the next page



## Luke Warm Market

"Hey \_\_\_\_ how are you? This is actually kind of crazy but the financial firm I'm with just told me that we are going to be expanding and asked me if I knew anyone that I think could be a good fit, and since we just spoke the other day I was thinking of you. I know you don't have a background in this space, and neither did I, but it's super fulfilling, the income opportunities are great, and I really think you would love it. Obviously I can't guarantee anything, but If I refer you, would you be open to having a conversation with one of the expansion directors?"

**Them:** Yes

### **STEP 7**

Trainer calls using the 3 good quality script:

"Hello, may I speak to (NAME)? How is it going (NAME) my name is (TRAINER) and your good friend \_\_\_\_\_ referred you to us, do you know \_\_\_\_\_? Awesome.

Well I'm not sure if he told you or not but we asked him if he knew anyone that he thought could be a great fit and he thought of you. (AGENT) said that you were \_\_\_\_\_, \_\_\_\_\_, and \_\_\_\_\_, are these great things true about you? Well that's good to hear. I really like (AGENT) and know he's not the type of person that would just refer anyone over to us so based off his recommendation we wanted to set up an interview with you in the next day or so to get to know you more and give more clarity on the positions to see if it's a good fit.

What does your schedule look like tomorrow?"

### **SCHEDULE APPOINTMENT**



## **Movers & Shakers**

### **Step 1**

Movers and Shakers script: Call those with influence that you know with a hot button (i.e. Hate working for others, not able to spend enough time with family, not paid what their worth)

### **Script**

"Hey, how are you? Do You have a quick second? Well listen, the reason I'm calling is because our firm is looking for legit people with influence that can help us expand, open up new regions, and want to build something where they can eventually have ownership in the company. So I made a list of movers and shakers that would potentially make great business partners with our firm and I put you on my list.

Obviously I can't guarantee anything but if I could potentially get your foot in the door would you be open to getting on a zoom for 30 minutes to get clarity on what it would look like to partner with us?"

### **SCHEDULE APPOINTMENT**



## Running For Promotion

This strategy will lead to the prospect potentially referring people to you, potentially becoming an agent, and potentially becoming a client.

### **SCRIPT**

"Hey \_\_\_\_\_, how are you? (Small Talk)

Well the reason I'm calling is because I'm Working On Getting A Promotion With Our Firm, And I Was Wondering If I Could Share With You What I'm Doing On A Quick 20 Minute Zoom, So If You Happen To Know Anyone Who Might Be Interested You Can Refer Them To Me?"

**Them:** Of course

"So Does Tomorrow Or The Next Day Work Better?"

### **APPOINTMENT STRUCTURE:**

1. Company credibility / Showing the companies we work with
2. \$1,000 a month illustration plugged into GFI Rocket
3. Compensation that an agent would make helping a client save \$1,000 a month into our services

# Common Questions

## **What Is The Company Name?**

The company is Global Financial Impact, and we work with 20+ multi-billion dollar financial institutions. We do business not only here in the United States but also in 33 other countries! Does that make sense?

## **Is this an MLM?**

"We are a financial firm that is extremely regulated"

## **Is It Hourly, Salary, or Commission?**

"That is a great question, one of the beautiful parts about GFI is that the firm is flexible. What they typically like to do, is get to know you more and then help you shape an income strategy that's going to be best for you and your family, does that sound good?"

## **Where do you get your clients from?**

"That is a great question. Our clients come from a variety of different places. 1) Self acquisition, meaning we allow you to bring your own clients and help people you know and love unlike the rest of the industry. 2) We can help provide you with clients once properly trained. 3) Referrals from the clients we have already helped. and last but not least, 4) You have the ability to purchase leads if you would like.

## **How many hours do I have to commit?**

"Well the good news is, there are no mandatory hours, but our average part timer works about 5 to 10 hours per week depending on what their schedule permits, but obviously the more you put in, the better your results will be. Does this make sense?"

## **What is the \$199 For?**

"That is a great question. What the \$199 does, is it gets you set up on our platform, it completes your background check that allows you to do business with the 20+ fortune 500 companies that are on our shelf, and it takes care of your pre licensing courses that you are required to complete in order to take your life license exam. The good news, is that normally those courses are over \$250, but because we put so many people through the process we are able to get them discounted and bundle everything within the \$199, which is also a tax write off, that's pretty amazing isn't it? "

## **I don't have a background in finance. How will I learn the information?**

"That's a great question. We actually have an incredible training program that will teach you everything you need to know in order to be successful and confident. But don't be intimidated, it is actually very successful. Does that sound good?"

## **I don't like sales...**

"No problem at all, just curious, do you like helping people? Yes? Well that is our approach. Because our average client remains our client for 10 to 30 years, we take more of an educational approach and build long lasting relationships rather than being salesy and pushy. That sounds way better, doesn't it?"

## **Do I have to recruit people?**

"No not at all, we have agents on our platform that only help clients, and then we have agents that want to build an agency, kind of like real estate, it just comes down to what they would like to do. Does this make sense?"

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# 3 Good Qualities Script

This script is used by the trainer to set up recruiting interviews with potential business partners for the new agent. You will need this script during the Onboarding 2 because that is when we start building the new agent an agency. It is also typically used to call any person that has been prospected and or referred over to the firm to work with us.



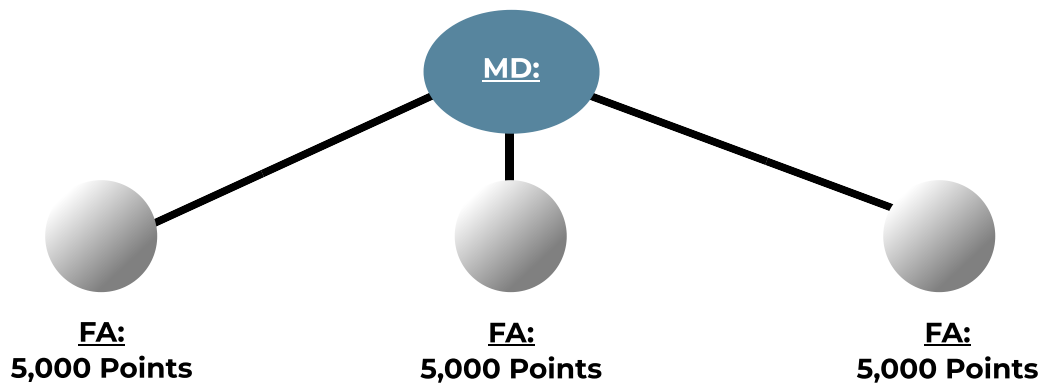
## **TRAINER**

"Hello, may I speak to (NAME)? How is it going (NAME)? My name is (TRAINER) and your good friend \_\_\_\_\_ referred you to us. Do you know \_\_\_\_\_? Awesome. Well I'm not sure if he told you or not, but he recently took a position with our firm and we have been super impressed, so we asked him if he knew anyone that he thought could be a great fit and he thought of you. (TRAINEE) said that you were \_\_\_\_\_, \_\_\_\_\_, and \_\_\_\_\_. Are these great things true about you? Well that's good to hear. I really like (TRAINEE) and know he's not the type of person that would just refer anyone over to us so based off his recommendation we wanted to set up an interview with you in the next day or so to get to know you more and give more clarity on the positions to see if it's a good fit. What does your schedule look like tomorrow?"

## **Schedule Appointment**

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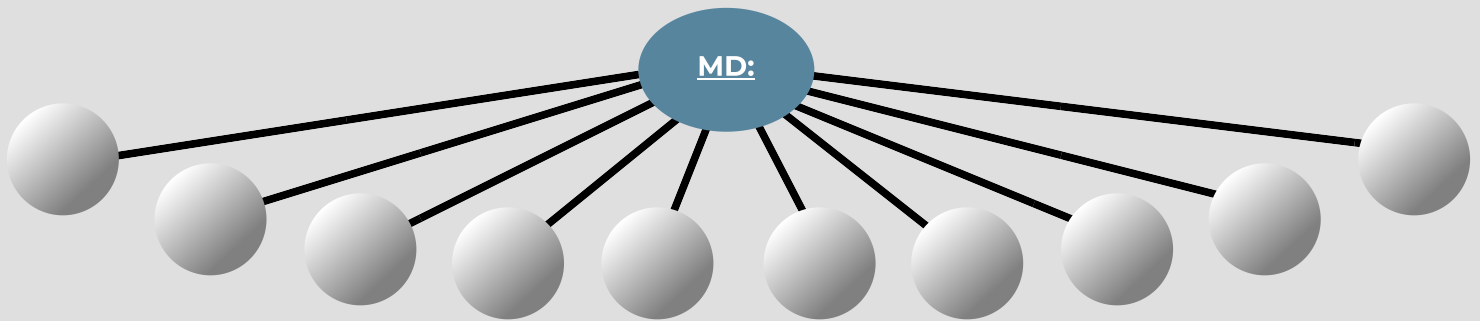
# Personal Compensation Example



Personal:  
 $25,000 \times 60\% = \$15,000$

MD Base Shop:  
 $15,000 \times 15\% = \$2,250$

Total Income: \$17,250 Per Month x 12 = \$207,000 Per Year



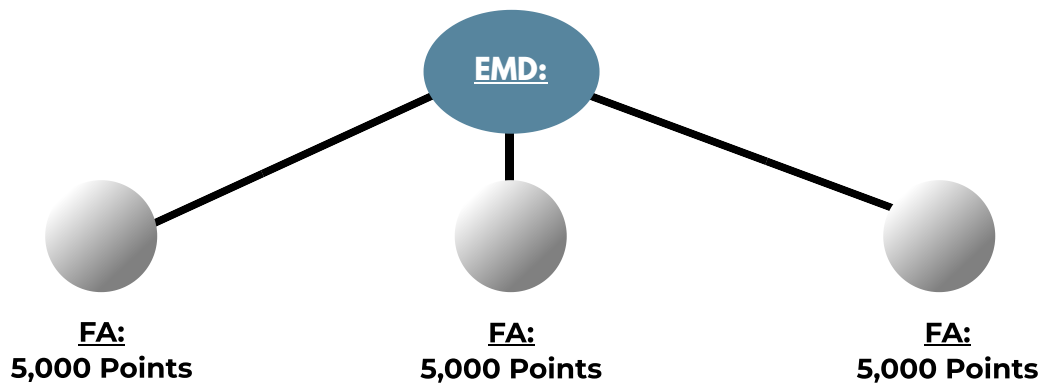
This Assumes That Every FA Does 7,500 Points Per Month

Personal:  
 $25,000 \times 60\% = \$15,000$

MD Base Shop:  
 $75,000 \times 15\% = \$11,250$

Total Income: \$26,250 Per Month x 12 = \$315,000 Per Year

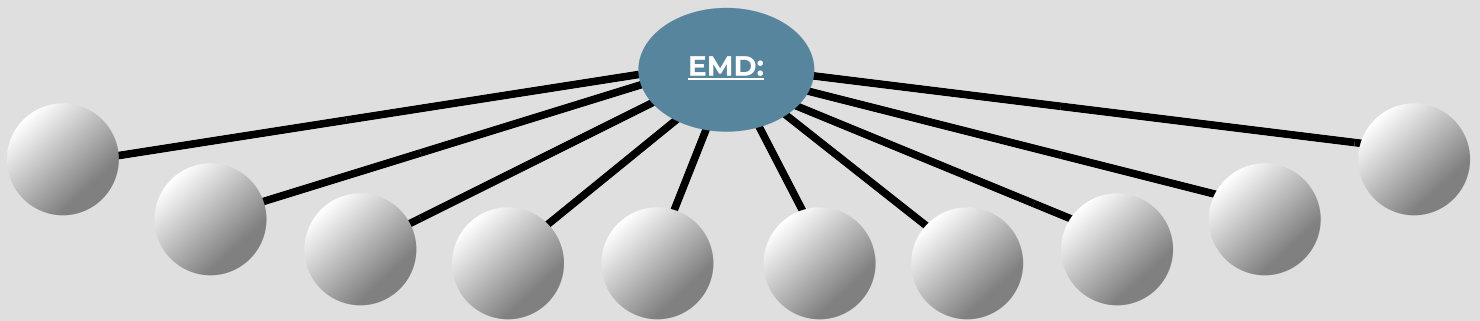
# Personal Compensation Example



Personal:  
 $25,000 \times 85\% = \$21,250$

MD Base Shop:  
 $15,000 \times 40\% = \$6,000$

**Total Income: \$27,250 Per Month x 12 = \$327,000 Per Year**



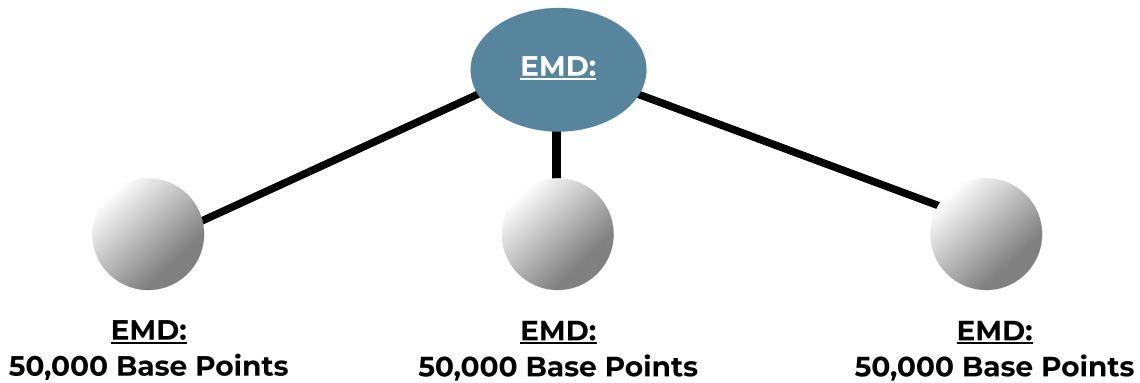
**This Assumes That Every FA Does 7,500 Points Per Month**

Personal:  
 $25,000 \times 85\% = \$21,250$

MD Base Shop:  
 $75,000 \times 40\% = \$30,000$

**Total Income: \$51,250 Per Month x 12 = \$615,000 Per Year**

# Personal Compensation Example

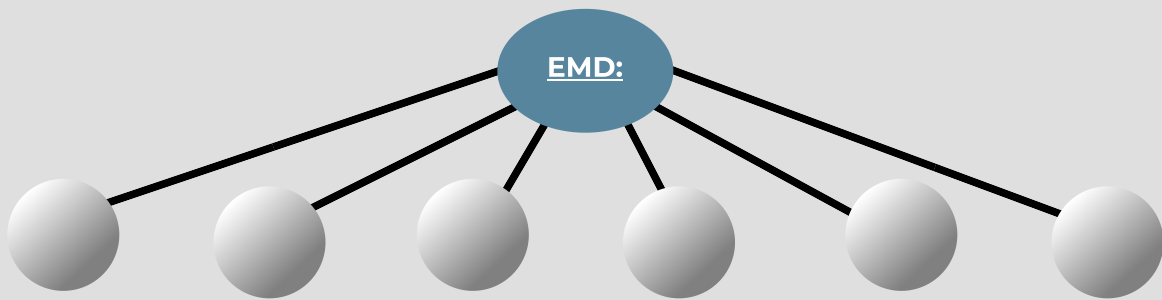


Personal:  
 $25,000 \times 85\% = \$21,250$

Base Shop:  
 $25,000 \times 40\% = \$10,000$

Super Base:  
 $150,000 \times 18\% = \$27,000$

Total Income: \$58,250 Per Month x 12 = \$699,000 Per Year



This Assumes That Every EMD Base Shop Does 50,000 Points Per Month Including Yours

Personal:  
 $25,000 \times 85\% = \$21,250$

Base Shop:  
 $25,000 \times 40\% = \$10,000$

Super Base:  
 $300,000 \times 18\% = \$54,000$

Total Income: \$85,250 Per Month x 12 = \$1,023,000 Per Year

# Personal Compensation Example

## EMD PERSONAL INCOME:

**\$2,000 Per Month IUL**

$$\begin{aligned} & \$2,000 \times 12 \\ & = \underline{24,000 \text{ Points}} \\ & \times 85\% \end{aligned}$$

**= \$20,400 Month**

**\$250,000 Rollover**

$$\begin{aligned} & \$250,000 \times 7.25\% \\ & = \underline{18,125 \text{ Points}} \\ & \times 85\% \end{aligned}$$

**= \$15,406 Month**

## TOTAL PERSONAL INCOME:

**\$35,806 Per Month x 12 = \$429,672 Per Year**

This income example includes the Base Shop bonus of 5%

## \$500,000+ Income Example

### Personal Income

$$\begin{aligned} & 25,000 \text{ Points} \\ & \times \underline{80\%} \end{aligned}$$

**\$20,000**

### Base Shop Income

$$\begin{aligned} & 85,000 \text{ Points} \\ & - \underline{25,000} \\ & = 60,000 \text{ Points} \\ & \times \underline{30\% \text{ (avg.)}} \end{aligned}$$

**\$18,000**

### Base Shop Bonus

$$\begin{aligned} & 85,000 \text{ Points} \\ & \times \underline{5\%} \end{aligned}$$

**\$4,250**

**Total = \$42,250 Per Month x 12 = \$507,000 Per Year**

# Builders Compensation Example

**\$1,200,000+ Income:**

<u>Personal Income</u>	<u>Base Shop Income</u>	<u>Super Base Income</u>	<u>Super Team Income</u>	<u>Bonus Income</u>
25,000 Points <u>x 80%</u>	100,000 Points <u>- 25,000</u> = 75,000 Points <u>x 30% (avg.)</u>	400,000 Points <u>- 100,000</u> = 300,000 Points <u>x 15%</u>	n/a	Base Shop <u>100,000 x 5%</u> \$5,000  Super Base <u>300,000 x 3%</u> \$9,000
<b>\$20,000</b>	<b>\$22,500</b>	<b>\$45,000</b>		

**TOTAL PERSONAL INCOME:**

**\$101,500 Per Month x 12 = \$1,218,000 Per Year**

# Builders Compensation Example

**\$6,000,000+ Income:**

<u>Personal Income</u>	<u>Base Shop Income</u>	<u>Super Base Income</u>	<u>Super Team Income</u>	<u>Bonus Income</u>
25,000 Points <u>x 80%</u>	100,000 Points <u>- 25,000</u> = 75,000 Points <u>x 30% (avg.)</u>	1,100,000 Points <u>- 100,000</u> = 1,00,000 Points <u>x 15%</u>	5,000,000 Points <u>- 1,100,000</u> = 3,900,000 Points <u>x 5% (avg.)</u>	Base Shop <u>100,000 x 5%</u> \$5,000  Super Base <u>1,000,000 x 3%</u> \$30,000  Super Team <u>3,900,000 x 2%</u> \$78,000
<b>\$20,000</b>	<b>\$22,500</b>	<b>\$150,000</b>	<b>\$195,000</b>	

**TOTAL PERSONAL INCOME:**

**\$500,500 Per Month x 12 = \$6,006,000 Per Year**

# Builders Compensation Example

**\$12,000,000+ Income:**

<u>Personal Income</u>	<u>Base Shop Income</u>	<u>Super Base Income</u>	<u>Super Team Income</u>	<u>Bonus Income</u>
25,000 Points <u>x 80%</u>	200,000 Points - 25,000 = 175,000 Points <u>x 30% (avg.)</u>	2,200,000 Points - 200,000 = 2,000,000 Points <u>x 15%</u>	10,200,000 Points - 2,200,000 = 8,000,000 Points <u>x 5% (avg.)</u>	Base Shop <u>200,000 x 5%</u> \$10,000  Super Base <u>2,000,000 x 3%</u> \$60,000  Super Team <u>8,000,000 x 2%</u> \$160,000
\$20,000	\$52,500	\$300,000	\$400,000	

**TOTAL PERSONAL INCOME:**

**\$1,002,500 Per Month x 12 =  
\$12,030,000 Per Year**

**"The Money You Make Should Be  
A Byproduct Of The People You  
Help And The Person You  
Become In The Process"**

