

UNIVERSAL SUCCESS SYSTEM



CERTIFIED FIELD TRAINER SIGN-OFF SHEET

Universal Wealth

Forbes Finance Council

MASTER PROPER EDIFICATION(express value of trainer's time)

CONFIDENTLY PRESENT WEBSITE OVERVIEW(make connection & Provide value)

EFFECTIVELY PERFORM FNA PROCESS(ask discovery questions)

BREAKDOWN FNA AND RUN ILLUSTRATIONS

IUL: At Least 1 of the Following

F&G

NLG

ANNUITY: At Least 1 of the Following

ATHENE

NORTH AMERICAN

NATIONWIDE

ACCURATELY SUBMIT LIFE & ANNUITY APPLICATIONS

IUL: At Least 1 of the Following

F&G

NLG

ANNUITY: At Least 1 of the Following

ATHENE

NORTH AMERICAN

NATIONWIDE

AGENT SIGN-OFF DATE:

AGENT NAME

AGENT SIGNATURE

TRAINER NAME

TRAINER SIGNATURE