

SYSTEM PROGRESSION

REFERENCE GUIDE

- **FNA:** Stands for “Financial Needs Analysis”.
- **INFO GATHER:** The process of gathering a client's basic information for the purpose of creating an FNA.
- **CARRY BACK:** The process of presenting a prospective plan to a client.
- **BPM:** Stands for “Business Presentation Meeting”. Typically refers to webinars in present time.
- **AMA:** Stands for “Associate Member Agreement”; the process of acquiring your agent code.
- **HLLQP:** Stands for “Harmonized Life Licensed Qualification Program”. This is the pre-qualification program you must complete in order to challenge the provincial life license exam.
- **1-1-7:** 1 new teammate brought into the business, 1 family helped (must generate 1,000 points) can be your own family or another family, within a 7-day time period.
- **2-2-30:** 2 new teammates brought into the business, 2 families helped (must generate 3,000 points), within a 30-day time period. *Only eligible in first 30 days from AMA.
- **3-3-30:** 3 new teammates brought into the business, 3 families helped (must generate 5,000 points), within a 30-day time period.
- **PDR:** Stands for “Practice. Drill. Rehearse.”
- **LICENSE IN HAND:** License issued by the provincial insurance council.
- **LICENSE ON THE SYSTEM:** Received approval email from WFG, license on myWFG system.
- **NET LICENSE:** Agent is licensed on the system and has earned \$1,000 in the business.
- **ASSOCIATE PROMOTION:** Earned by achieving a 3-3-30 (rolling 30 days NOT calendar month)
- **CERTIFIED FIELD TRAINER (CFT):** Must be a licensed associate, complete 10 qualified field training appointments, and personal plan complete.
- **5-5-30:** As a team, 5 new teammates brought into the business, 5 families helped (must generate 15,000 points), within a 30-day time period (calendar month). Doing this 3 months in a row will earn you your blue jacket.
- **MARKETING DIRECTOR (MD) PROMOTION:** 3 direct licensed legs and 40,000 points on the system in a 90 day rolling period (1/2 of points must be personal).
- **DDR:** Stands for “Double Digit Recruiting”. A team or individual that recruits 10 or more people in a single month.
- **10-10-30:** Completing 5-5-30 and having another agent on your team complete 5-5-30 outside of you in a calendar month. Doing this 3 months in a row will earn you your black jacket.
- **SENIOR MARKETING DIRECTOR (SMD) PROMOTION:** see theSEDT.com > Resources > Promotion and Advancement guidelines
- **15-15-30:** Completing 5-5-30 and having two other agents on your team complete 5-5-30 outside of you in a calendar month. Doing this 3 months in a row will earn you your maroon jacket.