

## Getting Started



We're excited about your interest in the Financial Representative opportunity! As you take the next steps into this unique experience, there are a few things we would like you to know.

### Licensing

In order to take advantage of this opportunity, you will need to obtain a provincial license to sell life, accident and health insurance products. Our starter kit will give you all the information you need to go about obtaining that license, but all fees involved will be your responsibility as a cost associated with starting your business.



### Background and Credit Checks

You are entering a business where you will be responsible for providing financial guidance and maintaining the privacy of your clients' sensitive information. It is important that FaithLife Financial and its Financial Representatives keep client information protected and confidential. Therefore, it is important that we make some inquiries into the background of each potential Financial Representative prior to beginning the contracting and licensing process.\* Once you have submitted your non-refundable, \$150 fee and paperwork, you will receive several forms to fill out and return. This information will be used by FaithLife to perform personal background and credit checks. It will not be used for any other purpose.

Please sign the attached Back Check "Consent for Disclosure of Personal Information" form. We will also require a photo-copy of the front and back of two pieces of identification which must include photo and candidate name (non-government issued ID is acceptable). Please ensure that the copy is legible.\*

### Additional Training

In addition to the training you must receive as part of the licensing process, FaithLife provides product and sales training which must be completed prior to becoming a fully contracted Financial Representative. This training will help prepare you to effectively build your business in accordance with FaithLife Financial standards.

Congratulations on taking this first step toward becoming a FaithLife Financial Representative! If you have further questions about any of the information presented above, please do not hesitate to contact us.

\*Background checks may reveal certain facts or circumstances that may preclude the approval of your sponsorship by FaithLife Financial or the Financial Services Commission of Ontario (FSCO). It is possible that based on the facts or circumstances, approval will be denied before or even *after* you have obtained the necessary licenses. Please keep in mind that the \$150 entry fee is non-refundable, regardless of the results of the background check.

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In addition to the terms of the Financial Representative Contract, FR's agree to:

1. Complete licensing requirements and a business plan.
2. Follow up on each sales opportunity generated through the FaithLife Financial at Home Gatherings.
3. Report activity and results as required.
4. Participate in monthly teleconference team meetings as well as face-to-face development opportunities.
5. Maintain distinct FLF@Home files for each client generated through this process. Submit feedback forms to the leadership team following each event.

Financial Representatives are eligible to participate in FaithLife Financial's Errors and Omissions Insurance program. (E&O coverage is mandatory).

Looking forward to an exciting period of learning, new sales development and success!

I agree to the above:

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Financial Representative

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Lynn Wagner,  
Director of Distribution & Development

Date: \_\_\_\_\_

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Thank you for your interest in becoming a financial representative! Your \$150.00, non-refundable entry fee and signed entry documentation get you:

- A Business Builder Program to help you get your business up and running
- A Orientation Guide to help you through the licensing and training process
- Your FaithLife Financial at Home Get Together Sales Kit, including all display boards, clings, an initial supply of handouts, postcards, host brochures and invitations.

Please enter your shipping information below. Once your fee has been received, we'll send you the documentation we'll need in order to send the materials listed above. Thank you, and congratulations on taking this important step forward!

Date: \_\_\_\_\_

First Name: \_\_\_\_\_

Middle Initial: \_\_\_\_\_

Last Name: \_\_\_\_\_

Address: \_\_\_\_\_

Address 2: \_\_\_\_\_

City: \_\_\_\_\_

Province: \_\_\_\_\_

Postal Code: \_\_\_\_\_

Email: \_\_\_\_\_

Phone Number: \_\_\_\_\_

Phone Type: Home  Work  Cell

Best Time to Call: \_\_\_\_\_ a.m. \_\_\_\_\_ p.m.

Referral Name: \_\_\_\_\_

Licensing: I already hold a Life, Accident and Health License.

I do not yet hold the above license.

Background Check: Photo-copies of the front and back of two pieces of identification.

Cost: \$150.00