Colburn Financial

BOOTCAMP

OUTLINE

Take Notes

Create Notes

DAY 3 – Pro Tips

Tracking Sheets

What are the 4 Tracking sheets to use?

1. _____

2. _____

3. _____

4. _____

Opt! Pro Tips

What are the 4 things Opt should be used for?

1. _____

2. _____

3. _____

4. _____

Take Notes

Create Notes

What should you <u>NOT</u> be using Opt! for?

1. _____

2. _____

Once you have an agent # with a carrier. Where do you go for e-apps?

_____

Molly's Carrier New Business Need to know:

https://docs.google.com/document/d/1JOPCerxLRxHYBHkG3Wim364rdcANTMQlUjeDvIXTLQk/edit

Recap for this weekend

How Will I use This?

Why Must I use This?

When Will I use This?