✅ What To Do First – New Agent Checklist

Your step-by-step guide to hit the ground running at Legacy Agent

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☐ **1. Save Your Login Info**
Bookmark LegacyAgent.com and keep your login credentials saved somewhere secure. You'll return here often for training, tools, and updates.

☐ **2. Track Carrier Approvals**
Your contracts have been submitted — now it's just a matter of time. Most approvals take 7–10 business days. You'll get a confirmation email (with your writing number) from each carrier once you're active.

☐ **3. Make Sure Your E&O Is Current**
E&O (Errors & Omissions insurance) is required by most carriers. If you haven't already submitted proof, please upload it through your SureLC profile or send it to us directly.

☐ **4. Start Training Based on Your Focus**
Pick your path and dive into training while you wait for carrier approvals:

- 👉 [Final Expense Coaching Page]
- 👉 [Mortgage Protection Coaching Page]
- 👉 [IUL Training (Coming Soon)]
- 👉 [Annuity Training (Coming Soon)]
  Watch the videos, download the guides, and begin practicing your script.

☐ **5. Understand the Markets You'll Be Working In**
Each product line has its own nuances. As you go through training, start familiarizing yourself with what makes each market unique:

- **Mortgage Protection** – Term or perm coverage with living benefits for new homeowners
- **Final Expense** – Simplified whole life for seniors, often no medical exam
- **Indexed Universal Life (IUL)** – Designed for long-term cash value and tax-advantaged income

- **Annuities** – Used for retirement income planning and protecting client assets
  You'll learn which clients are the best fit for each — and how to match them with the right solutions.

☐ **6. Choose Your Lead Strategy**
Review lead options to decide how you'll get in front of clients:

- Organic & Referral-Based
- Direct Mail (MP or FE)
- Digital Leads
  Need help? Reach out — we'll match your budget and goals with the best fit.

☐ **7. Get Field-Ready with Your Tools**
Make sure you're ready to run appointments from home or in the field. At a minimum, you'll need:

- Zoom (for remote appointments)
- A quiet space for calls or Zooms
- Web browser and PDF reader
- Access to your email and Calendar (Calendly works best)
- **Legacy CRM-AMS** — your full lead, client, policy, and task management system
  👉 Register here: **Legacy CRM-AMS Platform**
  👉 Quick Start Guide: **Follow this link for the Guide**

☐ **8. Download & Review Your Presentation Flow**
Don't wait until you're in front of a client. Start reviewing your sales presentation now. Use the Presentation Flow Guide PDF and practice it out loud.

☐ **9. Book a Mentorship Call (Optional)**
If you'd like personalized guidance to speed things up, grab a slot on Michael's calendar here:
📅 **Schedule a Zoom Call**