Welcome to New York Life!

South Florida General Office

Click here to Start

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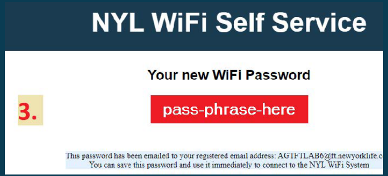
Wifi Setup	NYL View	PTAS Day 7	Agent Brochure
Email Setup	PTAS Day 0/Day 1	PTAS Day 8	SIE study materials
In House IT support	PTAS Day 2	PTAS Day 9	South Florida Management Team
Hearsay Relate	PTAS Day 3	PTAS Day 10	Product Team/Sales Support
Social Media Setup	PTAS Day 4	Important Attachments included in email	Important contact numbers
Sales Central Setup	PTAS Day 5	25 point system	Office Locations
NYL Real Story video	PTAS Day 6	Training Schedule	Trigger Checklist

WiFi Setup

1. From your phone scan the QR code below or visit www.mywifi.newyorklife.com

2. Complete your portal login
3. Click generate passphrase button (you may need to zoom in to activate button

4. Your Agentlife_5G passphrase will display in red. You will use your portal ID and this passphrase to access agentlife_5G wifi



Next: Email Setup

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Agent Onboarding and Email setup

- www.ap.nyl.com ---Bookmark this site
-
- Log into your EPM system. There is a task in your EPM system that contains your email codes it is under the task named "Candidate information request". once in task scroll to the bottom and click "download" the next screen will contain your email codes
- PING ID and HYPR links please click HERE to access or call 888-569-5433

- Log into Info Central
- Info Central 9 dots and then click on outlook
- Set up your required email signature
  - Click on download button to view instructions
  - Ensure that “opt out” language is included
  - Signature is also required on emails from mobile devices
  - You will find the necessary office information on a later slide

Next: In housed IT support

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Michelle Leeman is our in house IT person. She will assist you in setting up your computer

Click link below to schedule a time:

New agent meetings(not including encryption/SecureDoc):

- New PTAS Agent Meeting https://calendly.com/mleeman/ptas

Learn More

Michelle Leeman

Dedicated Technician, New York Life Insurance Company

1300 Concord Terrace, Suite 500, Sunrise, FL 33323

914 846 7220 | VOIP

954 866 9066 | Mobile

mleeman@newyorklife.com

If you need immediate assistance, please contact New York Life Technical Support at **888 569 5433**

Michelle's weekly schedule is:
Monday and Friday Sunrise
Tuesday Miami
Wednesday West Palm Beach

Next: Hearsay Setup

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Hearsay Setup

- Sending a business text message outside of Hearsay Relate is NOT permitted

- Use of Hearsay Relate is MANDATORY

- In order to use Hearsay Relate please follow these steps below

    - Complete this course in NYLIC U
    - Click HERE to access the Hearsay Relate tools page
    - Follow the DIRECTIONS to set up Hearsay Relate

Next: Social Media Setup

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Social Media Setup

- Complete NYLIC-U's Social Networking course
- Access Marketing Central Hub
- Linkedin
- Receive welcome email from Hearsay Social
  - Set up workspace
  - Link your email and social media accounts
  - Connect approved social media business pages to Hearsay Social
- Personal social media accounts cannot be used for business

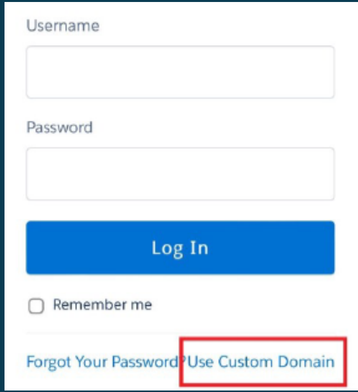
Sales Central APP and Mobile setup

https://nylic.lightning.force.com/lightning/page/home – Bookmark this site

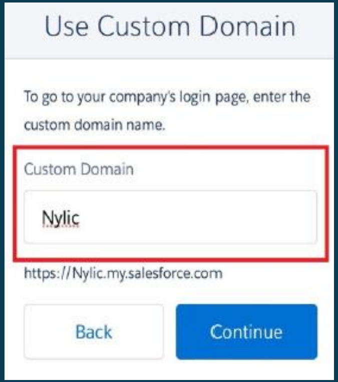
Confirm time zone - settings/Personal Info/Language/Time zone

- Search your APP store for "Salesforce" and download the application on your mobile device
- Select "Use Custom Domain (Picture A below)
- Type "NYLIC" in the custom domain field (Picture B below)
- Use your NYL login credentials (Picture C below)
- Choose "ALLOW" for access questions

A



B



C

Next: NYL real story videos

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Calendly

As a New York Life agent, you can now simplify scheduling by using Calendly to book meetings! Please follow the below instructions for creating and configuring your account.

Click HERE for the instruction

Next: NYL View

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NYL -View

In today's digital age, online video learning has become a common way to develop new skills.
At New York Life, we understand the value of this, which is why we've developed NYL View to enhance your learning experience. Use the links below to access the platform and the videos shown to you in your Day One Orientation.

CLICK HERE to Access NYL View

CLICK HERE to Access GuideMe Videos

DAY & DATE	FOCUS & TIME	DAILY TASKS	AGENT ASSIGNMENTS (Self-Study)	NYLICU COURSES BY DAY (Self-Study)
DAY 0 **Date: ___________**	**Technology Activation**	▶ Open EPM Candidate Info Task to get codes	✓ *All technology fully operational by end of day*	
		▶ Call Tech Support: 1-888-569-5433	✓ *Support ticket # noted if tech issues arise*	
		▶ Access NYL Today ·PingID & HYPR		
DAY 1 **1.5 hrs** **Date: ___________**	**Welcome & Orientation**	▶ MP Welcome Video — office culture, vision, dress code, expectations	✓ *Send Partner email confirming Day 1 completions*	*New Org Intro (2 min) ·* *Welcome to NYL (10 min)*
		▶ Set up wifi (www.mywifi.newyorklife.com)		*Replacement (45 min) ·* *Ethics (35 min)*
		▶ Set up: Access NYLToday, Email, Sales Central, NYLICU, E-Policy · Bookmarks & 9 Dots set up		
		▶ Review 10 day onboarding process & welcome package & all scripts/docs · Schedule appt w/ Michelle Leeman		*Annuity Workflow - summarizing the recommendation*

Next: PTAS Day 2

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DAY & DATE	FOCUS & TIME	DAILY TASKS	AGENT ASSIGNMENTS (Self-Study)	NYLICU COURSES BY DAY (Self-Study)
DAY 2 1 hr Date: ___________	Natural Market	▶ Review 15 market surveys — select top 5	✓ *Add 5 names (full name, email, phone, source, task, market) in Sales Central*	*Do Not Call (15 min) ·* *Vulnerable Adults (30 min)*
		▶ Referral conversation		
		▶ Introduce Memory Jogger document	✓ *Study & practice Initial Market Phone Script using Dialogue*	*Hearsay Relate (20 min) ·* *ATP Framework (20 min)*
		▶ Teach Sales Central names entry — add first 5 names (full name, email, phone, source, task, market)	✓ *Work on Memory Jogger Document*	
		▶ Introduce Dialogue	✓ *Send Partner email confirming Day 2 completions*	

Next: PTAS Day 3

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DAY & DATE	FOCUS & TIME	DAILY TASKS	AGENT ASSIGNMENTS (Self-Study)	NYLICU COURSES BY DAY (Self-Study)
DAY 3 **1.5 hrs** **Date: ____________**	**Business Plan**	▶ Business Plan with agent - Sections 1 & 2	✓ *Study VIPs Script · Practice with Dialogue*	*Identifying Natural Market (50 min)*
		▶ Watch Life Happens Introduction Video	✓ *Watch lifehappens.org videos*	*Intro to Critical Selling Skills (15 min)*
		▶ Elevator Pitch		
		▶ Create Hearsay texting number		
		▶ Add 5 names into Sales Central (full name, email, phone, source, task, market)	✓ *Send Partner email confirming Day 3 completions*	*Marketing Central Access (8 min)*

Next: PTAS Day 4

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DAY & DATE	FOCUS & TIME	DAILY TASKS	AGENT ASSIGNMENTS (Self-Study)	NYLICU COURSES BY DAY (Self-Study)
DAY 4 **2 hr** **Date: ___________**	**Activity System**	▶ Introduce 25-Point Activity System	✓ *Study GuideMe Our Process Script · Practice with Dialogue*	*Sales Central Intro (30 min) · E-Life Application (30 min)*
		▶ Plan the week — block calendar	✓ *Watch Guideme Video- whole process - using guideme videos*	*Agent Compensation TAS (36 min)*
		▶ Take agents through the entire sales process: guideme our process, factfinder, solutions, application		
		▶ Add 5 names into Sales Central (full name, email, phone, source, task, market)	✓ *Send Partner email confirming Day 4 completions*	

Next: PTAS Day 5

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DAY & DATE	FOCUS & TIME	DAILY TASKS	AGENT ASSIGNMENTS (Self-Study)	NYLICU COURSES BY DAY (Self-Study)
DAY 5 2 hrs Date: ____________	First FOD	▶ Business Plan with agent - Sections 3 to 6	✓ *Register 2 appts in Sales Central · Add 5 names (full name, email, phone, source, task, market)*	*Agent Cybersecurity (22 min)*
		▶ FOD 1-hr call session — schedule 2 appointments		
		▶ Teach how to enter appointments in Sales Central (New Event / Log a call)	✓ *Send Partner email confirming Day 5 completions*	*DOL PTE Non-Registered (45 min)*
		▶ Complete 25 points of activity		

Next PTAS Day 6

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DAY & DATE	FOCUS & TIME	DAILY TASKS	AGENT ASSIGNMENTS (Self-Study)	NYLICU COURSES BY DAY (Self-Study)
DAY 6 2 hrs Date: ________	Registration	▶ Business Plan with agent - Sections 7 - 9	*✓ Add 5 names (full name, email, phone, source, task, market) · 25 pts · Partner email*	*ATP Prospecting (1 hr virtual) · Natural Market Analyse (1 hr virtual)*
		▶ Partner reviews Calendar and 25 pts from Day 5 and plan for the following day	*✓ Register 2 appts in Sales Central · Add 5 names (full name, email, phone, source,*	
		▶ Request SIE study material - Build licensing schedule: SIE → Mo 2 · S6 → Mo 3 · S63 → Mo 5 · Explain NYLICU e-learning vs virtual vs skill builders		*Engaging Natural Market (40 min)*
		▶ FOD 1-hr call session → schedule 2 appointments		*Building Your Brand (30 min + 1 hr virtual)*

Next: PTAS Day 7

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DAY & DATE	FOCUS & TIME	DAILY TASKS	AGENT ASSIGNMENTS (Self-Study)	NYLICU COURSES BY DAY (Self-Study)
DAY 7 1 hr Date: ____________	**Personal Brand**	▶ Partner reviews Calendar and 25 pts from Day 6 and plan for the following day	*✓ Set up LinkedIn · Add 5 names (full name, email, phone, source, task, market) · 25 pts · 2 appts · Partner email*	*Nurturing Natural Market (40 min) · M&P Plan (40 min)*
		▶ Professional headshot & brochure → send to SMRU		*ATP Framework Skill Builder (1.5 hr) required to trigger*
		▶ LinkedIn setup instructions		*M&P Plan Skill Builder (1.5 hr)*

Next PTAS Day 8

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DAY & DATE	FOCUS & TIME	DAILY TASKS	AGENT ASSIGNMENTS (Self-Study)	NYLICU COURSES BY DAY (Self-Study)
DAY 8 30 min Date: ___________	Momentum	▶ Partner reviews Calendar and 25 pts from Day 7 and plan for the following day	✓ *Add 5 names (full name, email, phone, source, task, market) · 25 pts · 2 appts · Partner email*	*Continue NYLICU Onboarding (30 min/day)*
		▶ Continue onboarding NYLICU classes — 30 min/day in order		*start studying for the SIE (1 - 2 hrs/day)*

Next PTAS Day 9

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DAY & DATE	FOCUS & TIME	DAILY TASKS	AGENT ASSIGNMENTS (Self-Study)	NYLICU COURSES BY DAY (Self-Study)
DAY 9 **1 hr** **Date: __________**	**Product Training**	▶ Partner reviews Calendar and 25 pts from Day 8 and plan for the following day	✓ *Add 5 names (full name, email, phone, source, task, market) · 25 pts · 2 appts · Partner email*	*Annuity suitability training - required to sell*
		▶ Guidance on Required to Sell product training		*LTC certification · IDI training - required to sell*
		▶ Introduce Business Builder Form		*Study for the SIE (1 - 2 hrs/day)*
		▶ Schedule Intentional FOD's		*Continue NYLICU Onboarding (30 min/day)*

Next PTAS Day 10

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DAY & DATE	FOCUS & TIME	DAILY TASKS	AGENT ASSIGNMENTS (Self-Study)	NYLICU COURSES BY DAY (Self-Study)
DAY 10 **2 hrs** **Date: ___________**	**Review & Roadmap**	▶ Partner reviews Calendar and 25 pts from Day 9 and plan for the following day	✓ *Complete 25 pts · Add 5 names · Register 2 appts*	*Continue NYLICU Onboarding (30 min/day)*
		▶ Discuss NIPR.com · Present Roadmap to Success		*start studying for the SIE (1 hr/day)*
		▶ Partner & Agent Complete all EPM tasks		
		▶ Success Conversation: Get Registered income & bonus opp · Bonus for writing cases 5 a month, compensation components, case rate awards, career conference, council culture		
		▶ Daily Activity Expectation		
		▶ PARTNER ACTION: Send 10 day checklist completed and signed by Agent and Partner		
		▶ DM ACTION: Send PTAS calendar invites to agent for classes starting following week		

Next: Important attachments

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Learning Your Scripts

See attachments sent this this email

Sales Central

How-to Guide

Enter 25 Points Daily

Focusing on daily activities leads to results!

Activity Type	How to Enter It
CI Appt Completed **2 points**	Create Event and list TYPE as CI
Warm Name **3 points**	Create **Consumer** and list appropriate source Initial Market, Personal Introduction, CI, Personal Observation
Phone Contact= **An Ask for Appointment** **1 point**	Open Consumer **- Log a call** button in top right, select proper outcome (spoke with person/booked appointment)
Appointment Set **2 points**	Log the Call (listed above) Create Event and list TYPE as **APPOINTMENT** with subtype as **FACT FINDER**
Face Contacts **1 point**	Manually enter on PTW (edit) or disposition via Opting in to TEXTING
Completed Fact Finder **2 points**	Manually enter PTW (edit) or complete digital fact finder or disposition via Opting in to TEXTING
Present the Solution **3 points**	Move the stage of the Opportunity to Present Solution or disposition via Opting in to TEXTING
Completed Applications **5 points**	Move the stage of the Opportunity to Completed Application or enter Elife from the Opportunity
ARD **3 points**	When the Partner adds in a Candidate with ARD as source and Agent Name

To view 25 Points

1) Click on the 9 dots to toggle to FDS
2) Click on PTW tab
3) Select the appropriate week from the drop down menu.

REMINDER: In order for you to **receive a text to disposition the appointment** you must first opt in AND create an EVENT for each APPOINTMENT with the appropriate sub type.

Next: Training Schedule

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Week 1

	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY
7:30-8:00					
8:00-8:30					
8:30-9:00					
9:00-9:30					
9:30 -10:00	Business Builder	Intermediate	Foundation / Emerging	Advanced	New Reg Rep Training
10:00-10:30					
10:30-11:00	Monthly Call-A-Thon				
11:00-11:30			Mindset Academy (Optional)		
11:30-12:00					
12:00-12:30					
12:30-1:00					
1:00-1:30	Launchpad		Launchpad		
1:30 -2:00					
2:00-2:30					
2:30-3:00					
3:00-3:30					
3:30-4:00					
4:00-4:30					
4:30-5:00					
5:00-5:30					
5:30-6:00					

Week 2

	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY
7:30-8:00					
8:00-8:30					
8:30-9:00					
9:00-9:30					
9:30 -10:00	WIN Meeting	Intermediate	Foundation / Emerging		New Reg Rep Training (Bi-weekly)
10:00-10:30					
10:30-11:00					
11:00-11:30			Mindset Academy (Optional)		
11:30-12:00					
12:00-12:30					
12:30-1:00					
1:00-1:30	Launchpad		Launchpad		
1:30 -2:00					
2:00-2:30					
2:30-3:00					
3:00-3:30					
3:30-4:00					
4:00-4:30					
4:30-5:00					
5:00-5:30					
5:30-6:00					

Week 3

	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY
7:30-8:00					
8:00-8:30					
8:30-9:00					
9:00-9:30					
9:30 -10:00	Business Builder	Intermediate	Foundation / Emerging	Advanced	
10:00-10:30					
10:30-11:00					
11:00-11:30	Foundation / Emerging		Mindset Academy (Optional)		
11:30-12:00					
12:00-12:30					
12:30-1:00					
1:00-1:30	Launchpad		Launchpad		
1:30 -2:00					
2:00-2:30					
2:30-3:00					
3:00-3:30					
3:30-4:00					
4:00-4:30					
4:30-5:00					
5:00-5:30					
5:30-6:00					

Week 4

	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY
7:30-8:00					
8:00-8:30					
8:30-9:00					
9:00-9:30					
9:30 -10:00	Business Builder	Intermediate	Foundation / Emerging		New Reg Rep Training (Bi-weekly)
10:00-10:30					
10:30-11:00					
11:00-11:30	Foundation / Emerging		Mindset Academy (Optional)		
11:30-12:00					
12:00-12:30					
12:30-1:00					
1:00-1:30	Launchpad		Launchpad		
1:30 -2:00					
2:00-2:30					
2:30-3:00					
3:00-3:30					
3:30-4:00					
4:00-4:30					
4:30-5:00					
5:00-5:30					
5:30-6:00					

Your Partner may have scheduled time allocated for different different activities: PRPs, unit meetings, call sessions, appointments, FOD

Next: Agent Brochure

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Your Agent Brochure

We highly encourage you to personalize this agent form for your prospecting use. (You will need to have the final product SMRU approved.)

Click Here to personalize your own agent brochure

Just the right fit.

Whether you're starting a family, enjoying retirement, or wherever you find yourself, we offer products and solutions that can help you reach your financial goals.

Life Insurance.
New York Life offers a full array of products, including whole life, term life and universal life. With a variety of policies and riders to choose from, I can recommend a customized solution for almost any need you may have.

Annuities and investments
New York Life and New York Life Insurance and Annuity Corporation offers fixed deferred annuities for the accumulation stage of retirement, as well as guaranteed[1] future income annuities (fixed income annuities) that can help you turn savings into an income stream that will last a lifetime.

Individual Disability Insurance
Individual disability insurance policy can help protect your lifestyle by providing a monthly benefit that replaces a portion of the income you might lose if you experience a disabling event.

Long-term care Insurance
For more information on our Long-term Care Insurance, please visit our Company's website at http://www. newyorklife.com/products/ long-term-care.

[1] Guarantees backed by the claims-paying ability of the issuer.

New York Life Insurance Company
New York Life Insurance and Annuity Corporation (A Delaware Corporation)
51 Madison Avenue
New York, NY 10010
www.newyorklife.com
SMRU 5025507 (Exp. 3.10.2026)

Build strong financial strategies for your family and your business.

Agent Name, Approved designation
Financial Professional*

CA/AR Insurance Lic. # XXXXXX (if applicable)
New York Life Insurance Company
Street Address
City, ST 00000
Phone: 000.000.0000
Fax: 000.000.0000
email@ft.newyorklife.com

*Licensed Agent

Next: SIE study materials

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Agents send an email directly to the offsite_training@newyorklife.com (cc: your partner) SIE materials should be issued wuithin 24-48 hours so agents/candidates can begin preparing immediately.

Once the agent/candidate completes five Chapter Exams, the SIE voucher will be distributed. This allows the agent/candidate to better understand the time commitment before opening and scheduling their exam window.

The Free SIE Voucher Program will now only apply to individuals with emergencies. It will no longer be available for individuals who were simply not prepared.

SIE retakers will also submit their request to offsite_training@newyorklife.com and will be exempt from the five-chapter requirement, as they are responsible for payment of their voucher.

The Offsite Team will coordinate with Field Service Professionals only for ledger deductions when applicable. Field Service Professionals will no longer be involved in the overall SIE process.

All other licensing exam processes remain unchanged.

Please go to our South Florida web page to view our management

Click Here to be brought to our management team

Next: Product support contact numbers

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South Florida Resource Page

Agency Product Consulting Contacts

Brian Seguin	Zone Sales Officer	207-730-1437	bseguin@newyorklife.com
Sean Boller	Life Solutions Manager	516-778-3073	sboller@newyorklife.com
Chris Conlon	Investment Solutions Manager	201-563-0144	cjconlon@newyorklife.com
Dan Rivers	LTC, DI and Business Solutions Manager	954-815-7870	DRIVERS@newyorklife.com
Elizabeth Maitland	National Sales Desk Manager	914-319-8701	elizabeth_maitland@newyorklife.com
William Louie	National Life Sales Desk Manager	347-324-9396	William_J_Louie@newyorklife.com
Casey O'Donnell	National Investment & IDI & LTC Sales Desk Manager	914-217-8682	casey_o'donnell@newyorklife.com
Tim Farrell	National Eagle Investment Advisory Sales & Solutions	212-576-7232	Timothy_b_Farrell@newyorklife.com
Life Solutions			
Jackie Caldwell	Senior Life Solutions Consultant	973-307-5283	jlcaldwell@newyorklife.com
Christopher Hansen	Life Solutions Consultant	786-218-6250	Christopher_Hansen@newyorklife.com
Garrett LaPiana	Internal Life Solutions Consultant	914-846-7389	Garrett_M_Lapiana@newyorklife.com
Jesse Marcus Rivera	Internal Life Solutions Consultant	914-846-7446	JesseMarcus_S_Rivera@newyorklife.com
Pierce Roth	VUL Solutions Consultant	718-724-3867	pierce_m_roth@newyorklife.com
Investment Solutions			
Joseph Baumgartner	Senior Investment Solutions Consultant	704-604-8756	jbaumgart@newyorklife.com
Tyler Flynn-Corbin	Investment Solutions Consultant	973-508-7390	tflynncorbin@newyorklife.com
Latham Chamberlain	Internal Investment Solutions Consultant	914-846-7379	Latham_R_Chamberlain@newyorklife.com
Elias Padron	Internal Investment Solutions Consultant	914-846-7428	elias_padron@newyorklife.com
Long Term Care			
Jeffrey Marhafer	Long Term Care Consultant	504-432-7132	jmarhafer@newyorklife.com
Evelio Martinez	Internal Long Term Care Consultant	914-846-7326	evelio_k_martinez@newyorklife.com
Disability Income Solutions			
Shantel Sims	Disability Income Consultant	914-413-9713	shantel_sims@newyorklife.com
Evelio Martinez	Internal Disability Income Solutions	914-846-7326	evelio_k_martinez@newyorklife.com
Business Solutions			
Diva Velasquez	Business Solutions Consultant	386-490-3021	Diva_S_Velasquez@newyorklife.com
Dhanalakshmi Yuvaraj	Internal Business Solutions Consultant	914-846-7388	dyuvaraj@newyorklife.com
Advanced Planning			
Amine Khater	Senior Advanced Planning Consultant	848-702-9199	amine_m_khater@newyorklife.com
David Toups	Advanced Planning Consultant	945-214-2882	david_r_toups@newyorklife.com
Eagle Investment Advisory Sales & Solutions			
Robert Stein	Portfolio Specialist	212-576-7619	Robert_stein@newyorklife.com
Reynaldo Ortiz	Internal Consultant	212-576-4850	Reynaldo_A_Ortiz@newyorklife.com

Additional Resources

Sales Desk Contact Information: 1-800-NYLIFE-8 (800-695-4338) 9 a.m. to 6 p.m. Eastern Time

Life Sales Desk: Option 2, Option 4
VUL Sales Desk: Option 2, Option 7
Investment and Annuity Sales Desk: Option 3, Option 4
LTC Sales Desk: Option 4, Option 4
Business Solutions/Worksite Sales Desk: Option 2, Option 6
Disability Income Solutions Sales Desk: Option 5, Option 4

Eagle Investment Advisory Sales & Solutions: 1-888-695-3245 9 a.m. to 6 p.m. Eastern Time

Eagle Internal Consultants, Option 2
Envestment, Option 1
Eagle Operations, Option 3

Next: Important contact numbers

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Important Contact Numbers

- NYL Service Center
  - Clients call: 800-695-9873
  - Agents call: 800-695-5312
- NYL Field Tech Support: 888-569-5433
- Agent Benefits: 888-513-4636
- TeleApp: 866-695-8277
- APPS (for exam order or status): 954-430-8980
- South Florida General Office: 954-772-5200
- Sales Desk: 800-NYLIFE8 (800-695-4338)

The South Florida General Office

As a new Agent you will be "housed" in one of our locations, your address for business purposes is one of these locations listed below. As a housed agent, you will receive your access card.

1300 Concord Terrace, 5th Floor, Sunrise, Florida 33323
Main Number: 954-772-5200

5805 Waterford District Dr., Suite 310, Miami Florida 33126
a Main Number: 305-263-1400

7111 Fairway Dr., Suite 301, Palm Beach Gardens, Florida 33418
Main Number: 561-557-6191

777 Brickell Avenue, Suite 1370, Miami, Florida 33131
Main Number: 786-878-6368

Next: Trigger checklist

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SOUTH FLORIDA PRODUCTION REQUIREMENT

$750 Net Eligible Life Business | $3,000 Total FYC | Minimum 2 Cases
Non-Working PTA's: 45 Days | Working PTA's: 90 Days

NYLICU REQUIREMENTS

- [ ] Getting Started
  100% Completed
- [ ] Onboarding
  30% Completed (see required courses)

SIGN-OFF REQUIRED

Agent Signature: ____________________

Date:

Partner Signature: ____________________

Date:

SLI / DM Verified: ____________________

Date:

NOTES:

TRIGGERING REQUIREMENTS

- [ ] Trigger Interview: Phone Book, GuideMe approach talk & VIPS Referred lead talk
- [ ] 100 Names with phone & email entered in Sales Central
- [ ] 4-Touch campaign
- [ ] Enroll in Hearsay Relate & register for texting phone number
- [ ] 5 completed FODs - at least 2 hours must be phone coaching with Partner
- [ ] Fundamental Career School completed (before or within 1 month of triggering)
- [ ] All Contracting tasks closed
- [ ] Acceptable Coaching 360 performance metrics (names, appointments, dials)
- [ ] SIE Materials requested, 5 Chapters completed, Test Schedule
- [ ] 25-Point Activity System - demonstrated understanding and consistent use

"Extraordinary discipline, a strong self-esteem, and a resilient spirit."

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