

# The 8-Step Virtual Start-Up Program

<https://8step.trustworthy.life>

★ Watch the message from Barry Clarkson

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## STEP 1 - GET CONTRACTED

Complete requirements needed and gather documents to submit your insurance carrier contracting to **contracting@trustworthyfinancial.com**. Follow all instructions to get your contracts in place ASAP, for these carriers: **Mutual of Omaha, Americo, Foresters, American Amicable, Aetna/CVS, AIG, Government Personnel Mutual, Lafayette.**

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## STEP 2 - CREATE YOUR SCHEDULE

Learn how to set an effective schedule that you can commit to.

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## STEP 3 - SET UP YOUR VIRTUAL OFFICE

Get everything in order to effectively operate your business from your home office.

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## STEP 4 - UNDERWRITING & QUOTING TOOLS

Set up these tools that will help you properly evaluate health and create strong quotes for clients.

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## **STEP 5 - LEARN TO SET APPOINTMENTS**

Learn how to set up your lead order and how to set appointments.

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## **STEP 6 - LEARN TO HELP FAMILIES**

Watch virtual appointments and expert analysis from the virtual coaches.

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## **STEP 7 - ACTIVITY TRACKING**

Learn how tracking your activity leads to predictable success.

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## **STEP 8 - CONTINUE LEARNING**

Participate in training and coaching calls, as well as reviewing archived training highlights, and read recommended self-development resources.

Your Onboarding Liaison will reach back to confirm you've completed the 8 Steps on schedule.