

NEW LIFE PLANNER'S AGREEMENT

I (Life Planner), _____ agree to these activities:

Annual Income Objective: _____

1. Spend _____ % of my time each week directly prospecting and selling.
2. Add _____ prospect names to my Project 60 weekly.
3. Contact _____ prospects each week (phone, WhatsApp, or face-to-face).
4. Make _____ appointments each week.
5. Keep _____ Selling Call each week (70% of above).
6. Make _____ Closing Interview each week.
7. Obtain _____ New Case Submitted each week.
8. Obtain _____ referred leads per prospect seen.
9. Obtain _____ referred leads per sale made.
10. Obtain _____ referred leads for recruitment per prospect seen.
11. Spend _____ hours per week attending networking activities.
12. Spend _____ hours per week 1:1 meet with leader.
13. Attend all the required training as per Appendix.

Agent Signature: _____

Date: _____

Unit Manager Signature: _____

Agency Manager Signature: _____