

EC-21 Homework

EC-21 Class



Homework - Sales/Helping family:



IRA
TERM
IUL
Annuity
...

Writing Agent:

Producer/Trainer, name shown on the last page of application form
Writing agent is responsible to submit case homework to

Splitting Agent:

Agent shown on 'producer certificate'

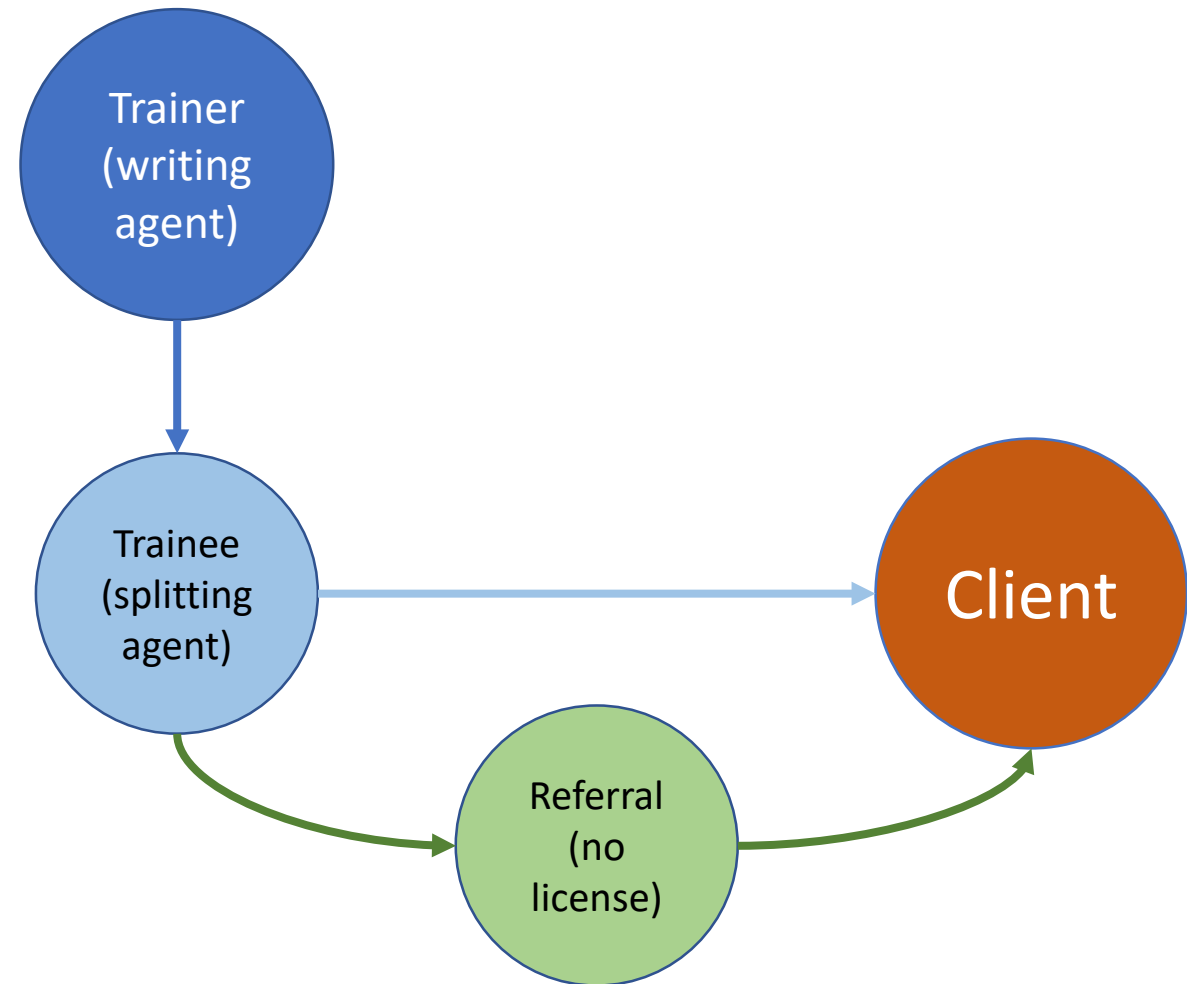
Referral Agent:

Direct referral agent, no license yet

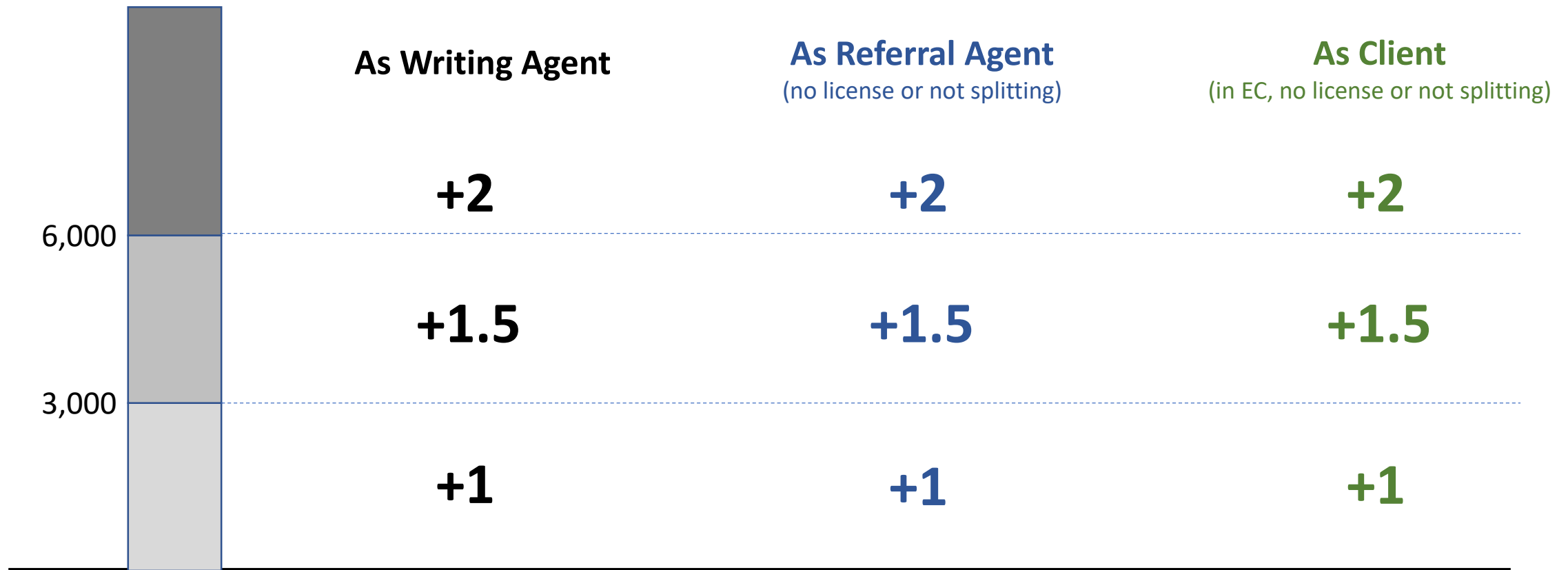
Client:

Can be either:

- a) non-member client
- b) member client without license
- c) member client with license but not participate in splitting the case



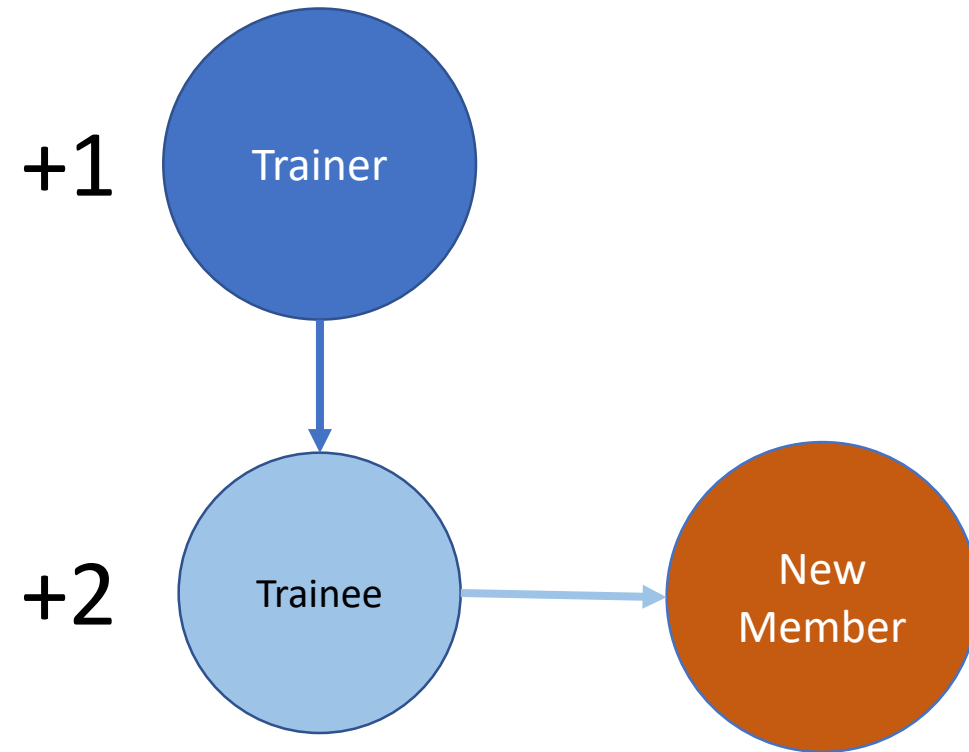
Sales – Only One Writing Agent



Sales – One Writing Agent with One Splitting Agent



Recruiting



Office BPM Attendance

- Minimum requirement: attend at least one office BPM/training a week
- Please follow the link on www.eastcoastec.com to submit BPM attendance.
- You are required to submit sign in on the same day of office BPM held.
- 100 miles

EC-14 BPM sign in sheet

* Required

Name *

Your answer

Agent ID *

Your answer

BPM attendance date *

Date

mm/dd/yyyy

Office *

Choose

SUBMIT

Bonus

- Cash flow
 - 1st \$1000 cash flow, **+2**
 - New Watch Earner (\$50K cash flow), **+3**
 - New Ring Earner 100k, **+6**
 - Ring earner 250k/500k/750k/1M, **+8**
- Promotion: Associate **+2**, SA **+4**, MD **+6**, SMD **+8**, EMD **+10**, CEO **+15**
- Follow up the link on www.eastcoastec.com
You need to submit **proof contract change form/email**

Recruiting homework submission

- Show proof of
 - New member agent ID
 - Recruiting date or MD approval date
- Two ways to submit proof doc:
 - New member welcome letter Email with agent ID and recruiter ID
 - www.mywfg.com, custom report -> downline status
- You can submit up to 5 recruits at once

EC-21 Recruits Submission

Recruiting

	New Member ID	Recruiter ID	Trainer ID
1	<input type="text"/>	<input type="text"/>	<input type="text"/>
2	<input type="text"/>	<input type="text"/>	<input type="text"/>
3	<input type="text"/>	<input type="text"/>	<input type="text"/>
4	<input type="text"/>	<input type="text"/>	<input type="text"/>
5	<input type="text"/>	<input type="text"/>	<input type="text"/>

Proof Document *

No file chosen

E-mail *

Comments

Downline Status



CHOOSE REPORT:

Downline Status ▼

The report results are based on the current hierarchy. The 'as of date' selected is used to verify if the license(s) is(are) valid for the day selected. Since licenses constantly update or change the report is only as good as the date and time it is run. The online report only displays 250 rows/agents. To see the rest of the report, please export it to an excel spreadsheet.

ASSOCIATE ID

12ODB

TEAM

SMD Base ▼

TYPE

Active ▼

AS OF DATE

9/7/2019



LEVEL

TA, A, SA ▼

Generate Report

Generate Full View



Run Date and Time: 9/7/2019 12:26:39 PM

Su, Ning, 12ODB, As of 9/7/2019, Type - Active, Team - Base Shop, Levels - 01,10,15

First Name	Last Name	Bulletin Name	Associate ID	Title Level	Comm Level	Downline %	MD Approval Date	Country
			69V	01	01	100	08/21/2019	US
			69P	01	01	100	07/31/2019	US
			69K	01	01	100	07/16/2019	US
			69J	01	01	100	07/16/2019	US
			69D	01	01	100	06/29/2019	US
			69D	01	01	100	06/29/2019	US
			68X	01	01	100	06/17/2019	US
			68U	01	01	100	06/11/2019	US
			68T	01	01	100	06/08/2019	US
			68Q	01	01	75	06/01/2019	US
			68L	01	01	100	05/25/2019	US
			68L	01	01	100	05/24/2019	US
			68G	10	10	100	08/26/2019	US

Sales Homework

- Input agents and client's names and ID in the table. Then submit the proof pages to shown:
 - 1) when this application was submitted/advanced
 - 2) how many points
 - 3) agents name and ID page
- Four ways to submit proof
 - Policy history from www.mywfg.com (high recommended)
 - Nationwide pending business
 - Transamerica pending business
 - Traditional way to submit application pages (not recommended)

EC-21 Sales Submission

Sales

	Writing agent	Splitting agent (if any)	Referral Agent (if any)	Client (if in EC)	Case Date	Total Points
agent ID	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Name	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Proof pages for:
agents, points and
app date *

Upload a File

E-mail *

ex: myname@example.com

Comments

Submit

Policy History



CHOOSE REPORT:

Policy History ▼

ASSOCIATE ID

12odb

POLICY #

B503

Validate Policy

Clear Policy

ASSOCIATE ID

120DB

120DB

17AAG

COMPANY NAME

NATIONWIDE INSURANCE ▼

DISPLAY ACTIVITY

Agent only ▼

REPORT TYPE

Policy History ▼

Generate Report

Generate Full View

See Instructions

When there are 2 agents, run
report for each agent.

1 of 2 ? Find | Next



WFG Reports

Policy History Report

Run Date: 9/7/2019 4:19:07 PM



Associate ID: 120DB

Associate Only

Policy History

Date

Policy Number	Company Code	Company Name	Writing Date
B5 [REDACTED]	PM0100	NATIONWIDE INSURANCE	05/29/2019
Customer Name	Product Type	Product Description	Issue In
[REDACTED] Name	Equity Index Universal Life	YOURLIFE INDEXED UL NY	NY

Cycle Date	Commission ID	AgentID	Total Field Commission	Level	Split CoLead Percent	Level Percent	Advances	Recoveries
05-31-2019		120DB	\$999.58	1	50.00 %	25.0000 %	\$124.95	\$0.00
05-31-2019		120DB	\$999.58	10	50.00 %	10.0000 %	\$49.98	\$0.00
05-31-2019		120DB	\$999.58	15	50.00 %	10.0000 %	\$49.98	\$0.00
05-31-2019		120DB	\$999.58	17	50.00 %	5.0000 %	\$24.99	\$0.00
05-31-2019		120DB	\$999.58	20	50.00 %	15.0000 %	\$74.97	\$0.00
05-31-2019		120DB	\$999.58	20	50.00 %	15.0000 %	\$74.97	\$0.00
Sub-Total:						\$399.84	\$0.00	
05-31-2019		120DB	\$799.66	1	50.00 %	25.0000 %	\$99.96	\$0.00
05-31-2019		120DB	\$799.66	10	50.00 %	10.0000 %	\$39.98	\$0.00
05-31-2019		120DB	\$799.66	15	50.00 %	10.0000 %	\$39.98	\$0.00
05-31-2019		120DB	\$799.66	17	50.00 %	5.0000 %	\$19.99	\$0.00
05-31-2019		120DB	\$799.66	20	50.00 %	15.0000 %	\$59.97	\$0.00
05-31-2019		120DB	\$799.66	20	50.00 %	15.0000 %	\$59.97	\$0.00
Sub-Total:						\$319.85	\$0.00	

40%

Points

Business Management

NOTIFICATIONS

PENDING POLICIES

INFORCE POLICIES

REPORTS

Policy Finder

<<Back



General Info | Policy Requirements | **Payment Info** | Policy Notes

Policy#:

Status:

Owner:

As Of: 9/7/2019 04:15 AM EDT

Insured:

App Signed Date: 08/27/2019

App Submitted Date: 08/27/2019

Policy Closure Date: 10/06/2019

Commission Advance At

Submit: 08/29/2019

Date

TFLIC Financial Foundation IUL 2015 GPT

Specified Amount: \$250,000.00

Death Benefit Option: Level

Underwriter: Tom Behrens

Billing Information

Billing Type: Bank Draft

Billing Frequency: Monthly

Billing Due Day: 27

Billing Amount: \$142.00

Monies Received: \$142.00

Group Bill Number:

Points

Future Payment Allocation

Business Management

NOTIFICATIONS

PENDING POLICIES

INFORCE POLICIES

REPORTS

Policy Finder

<<Back



General Info | Policy Requirements | Payment Info | Policy Notes

Policy#:

Agent Information

Name

Agents

Split %

ID

Business Phone

Broker Dealer

50%

718-886-5097

50%

718-886-5097

RIDER INFO


BENEFICIARY INFO

AGENT INFO



FOR FINANCIAL ADVISORS

KEJIA WANG ▾
Transamerica Financial Advisors Inc (tfg)

 **Favorites** ▾



Topics ▾

Products ▾

Servicing ▴

Client Servicing »

CLIENT ACCOUNTS »

Annuities

Life Insurance

Mutual Funds (DST Vision)

COMMON TASKS

BUSINESS MANAGEMENT »

Annuities

Life Insurance

Retirement Plans

Business Life

RESOURCES »



FOR FINANCIAL ADVISORS



Case status



Case indicator



In underwriting
06/26/2019

Underwriting decision

Issued

In force - complete

Aged case
73
Days elapsed

Client name

Date

Application receipt date:

06/26/2019

73 Days elapsed

Nationwide Indexed Universal Life Accumulator II

Specified amount:

\$1,000,000

Case status:

Pending Underwriting Requirements

Billing amount:

\$1,147

Commissions advanced:

Processed

Billing frequency:

Monthly

Death benefit option:

Option 1 - Level

Estimated annualized premium:

\$13,764

1035 Exchange:

N

Estimated target premium:

\$13,767

1035 Amount:

N/A

Firm name:

WORLD FINANCIAL GROUP INS AGCY

points

Producer:

Agent

KEJIA WANG

Case contact:

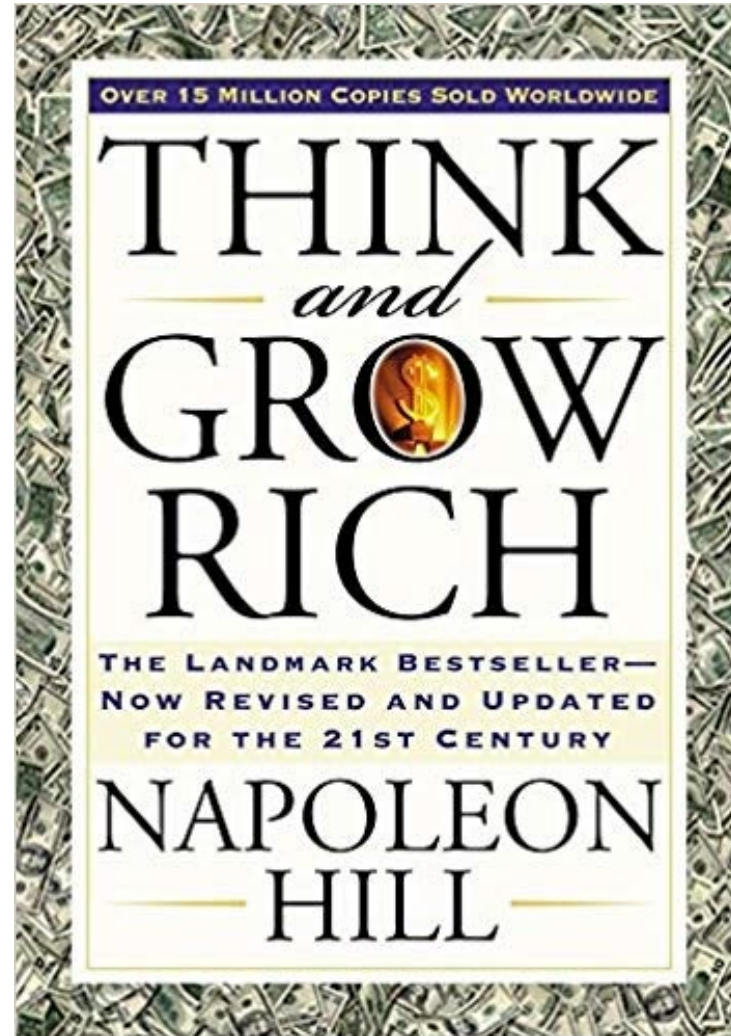
Replacement

- What is a replacement
 - Not in current EC
 - Must register the next EC together with the cadet
- +2 points for each replacement
- The replacement can attend one class in current EC
- When replacement register, the referral agent also needs to register

2020 NYKO Registration

	Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
				1	2	3	4
Jan 2020	5	6	7	8	9	10	11
	12	13	14	15	16	17	18
	19	20	21	22	23	24	25
	26	27	28	29	30	31	

Book reading



Graduation Requirement

	Graduation	Graduation with Certificate	Graduation with Honor
Min Points	+0.5	+6	+6
Personal recruit (no MAP or inactive transfer)		4	4
License and Cash Flow (during current EC)		Life, \$1,000	Life, \$1,000
Replacement			At least one
Team recruit			<p>Non-SMD: 10 team recruits in rolling 30-days or 5 team recruits for consecutive three months</p> <p>SMD: at least two BBC during EC period</p>