

FIELD PREPARATION

Bring your confidence and your A-game every single time. Remember, this is not about you. It is about the family you are helping.

- ❖ What to wear ☐
- ❖ Badge ☐
- ❖ Tablet/Laptop with Internet ☐
- ❖ A family Picture ☐
- ❖ Printed Lead Card (if available) ☐
- ❖ Laminated Credibility Sheet ☐
- ❖ Blank Paper Sheets ☐
- ❖ Final Expense Worksheet ☐
- ❖ Mortgage Protection Worksheet ☐
- ❖ Final Expense Underwriting Cheatsheet ☐
- ❖ Mortgage Protection Underwriting Cheatsheet ☐
- ❖ Product Brochures ☐
- ❖ Field Underwriter Document ☐
- ❖ Referral Worksheet ☐
- ❖ Leave Behind Text ☐
- ❖ Leave Behind Picture ☐
- ❖ A Messenger Bag ☐
- ❖ Physical Business Cards ☐
- ❖ Digital Business Card ☐
- ❖ Umbrella and Jacket ☐
- ❖ 4 fold-up chairs ☐
- ❖ Food / Water for the day ☐
- ❖ Stylus Pen for Touchscreen ☐
- ❖ Sticky Pads for Door-Knock ☐