New Agent
Orientation Checklist

- ☐ Licensing / Contracting Checklist
- ☐ New Agent Intake / Write Policy IF NEEDED
- ☐ Join team group chat (If Licensed)
- ☐ Go over team website / resources
- ☐ Go over “Best Practices”
- ☐ Give schedule of team trainings / meetings
- ☐ Complete Top 25 Worksheet
- ☐ Book of the Month is_____

Agent Name _____

Team Leader Signature of Completion _____

Date Completed_____

After completion of checklist, make a copy for the new agent, team leader and team leader’s upline.