

New Agent Fast Track Checklist

30 Day Roadmap

- ☐ Sign Agent Agreement - <https://www.afgroup1.com/>
- ☐ Breakdown a financial analysis for a personal life insurance policy.
- ☐ Sign up on Xcel – 32 hours Life only (English or Espanol) – calendar 30 days for follow-up - <https://xcelsolutions.myabsorb.com/#/public-dashboard> (code is “AP1”)



- ☐ Direct to New Agent requirement form with instructions to download and hold for now, to be filled out and emailed to contracting when license is issued - <https://www.afgroup1.com/>
- ☐ Office admin or leader add to GroupMe
- ☐ Send Name, birthday, email address, and phone number to Audrey@americaspride for agency newsletter and correspondence
- ☐ Sign-up on PSI to create username and password, not schedule yet - <https://test-takers.psiexams.com/cadi>
- ☐ Setup field and group trainings.
- ☐ Schedule PSI exam date preferably in-person with the option to have fingerprints processed. - <https://test-takers.psiexams.com/cadi>
- ☐ Have fingerprints impressions taken at an authorized <https://oag.ca.gov/fingerprints/locations>
- ☐ Apply for license on Sircon.com, approval takes average of 2 weeks and informed via email - <https://www.sircon.com/products/apply.jsp>
- ☐ Setup Errors & Omissions insurance with contracting
- ☐ Complete New Agent Requirements form and email to contracting@americaspride.com.