

Simple Steps for Success

Hiring Manager Name: _____ Phone Number(s): _____
Agent Login Password: _____

- Go to our team website <http://www.patriotinsurancegroup.com/> and login under the Agent Login located at the top left of the website. The password was provided on your New Agent Welcome Email. Contact your hiring manager for assistance if needed.
- Visit the Getting Started tab and go through the steps listed to start your training. There is a live call on Tuesday that also walks you through these steps (see below training schedule) and it is also recorded if you want to get a head start. [Recorded Training Call](#)
- Listen to the pre-recorded training call [How to Sell Final Expense](#) (Also located under step 7 under the Getting Started tab) and then share this presentation to three people you know before your first appointment.
- Listen to the pre-recorded training calls for lead carriers [Settlers](#), [Great Western](#) and [AIG](#) If these carriers are not available in your area or you opted out of contracting, please disregard.
- Attend Calls and Trainings

Every Monday

Dial-in: (712) 775-7031

Meeting ID: 251-234

<https://join.freeconferencecall.com/251-234>

- **9:30 am EST**
Team Call – updates and insights
Field Training – short training segments to help in selling Final Expense
- **1:00 pm EST**
Getting Started Training
[Recorded Training Call](#)
- **3:00 pm EST**
Settlers, GPM, Great Western Back-Office & Report Training
[Recorded Training Call](#)

Optional: Once you have a writing number you may submit a lead order. Lead program details and forms are located under Lead Program tab. Work with your manager to assist with setting up your initial appointments.