

## The WFG Business System

This powerful resource developed by the company's experienced field leadership, is a step-by-step blueprint that can help you build and grow your business. The system guides you on how to grow a client base, bring new associates into the business, mentor new associates, develop a game plan for success, and much more.

## The WFG Brand

WFG has a solid and strong reputation for helping families across North America have better financial futures. As an associate, you can leverage the WFG brand by use of the company's name, logo, image and marketing materials.

## WFGOpportunity.com

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## A Foundation for Your Success

## You Have Access

Investing in your future is the best investment you can make. When you pay World Financial Group's (WFG's) one-time administrative fee of \$100 (USD)/ \$125 (CAD), complete an Associate Membership Agreement and Application, and become an associate, you open the door to a wealth of resources that can help you build a strong, long-lasting business and a brighter future.

You have access to world-class tools that can help you build a business of your own, but not on your own. These resources include the WFG business platform and the back office support you'll need to help you be successful.

This brochure provides an overview of just some of the resources you can use as a WFG associate. Read on to learn how you can use these tools and the support of the WFG home office to build the business of your dreams.



## MyWFG.com

MyWFG.com, the associate's intranet, is filled with tools and information to help you build your business. As a new associate, it's important to become familiar with MyWFG as it is a resource that you will use over and over again in your business. Some of the information and tools you'll find here include:

### Presentation Builder

You can create customized slideshow presentations that you can save to your smartphone, tablet or laptop, giving you convenient access when you're on the road. There are also numerous WFG-created marketing materials that are available to you.

### Reports

There are a variety of reports that provide information on your business. These include commission information, team status reports, cash flow reports, licensing reports and more.

### WFG Talks

This section has audio and video selections from some of the best WFG field leaders and from major company events. The messages offer mentoring, coaching and inspiration to help you build a successful WFG business.

### Contest & Event Information

MyWFG includes information on WFG contests and events.

### Back Office Support System (BOSS)

Eliminate the need to fax or email forms to the home office. BOSS lets you complete forms online, allowing them to be processed faster.

### Contact Manager

This allows you to enter and view all your contacts and filter them using specific qualifiers. You can also port the information to specific tools that can help you streamline your recruiting and sales processes. Also, keep track of what events your new contact is attending or take note of what concerns he/she might have.



## Access to Industry Leading Product Providers<sup>1</sup>

As a licensed associate, you have access to a multitude of products provided through WFG's affiliated companies. You aren't captive to a particular company or product, instead you are connected to well-known, top-tier companies so you can offer your clients the power of choice.

### United States<sup>2,3</sup>



### Canada<sup>3,4</sup>



## Sales Desk

The WFG Sales Desk is a team of fully-licensed specialists who are knowledgeable about the products and services offered through WFG's affiliated companies. Sales Desk representatives offer you expert level information to help you feel confident when discussing products with clients.

The WFG Sales Desk also works in conjunction with our provider's sales desks to provide you with details about new products and services.

Contact the Sales Desk at 770-WFG-SELL (770-934-7355) in the United States, and 416-225-2286 in Canada, or via email at [WFGSalesDesk@transamerica.com](mailto:WFGSalesDesk@transamerica.com)

## Licensing

As a WFG associate, you have access to WFG-approved vendors who offer training to prepare you for your licensing examinations to help advance your career. These programs are usually available at a discounted rate for WFG associates.

## WFG Home Office Support Team (HOST)

The WFG Home Office Support Team (HOST) is the in-house associate services team that is ready to help you. If you have any questions about coding, commissions, licensing, services, technical support, or any other concerns, they are an excellent resource for you. Contact HOST in Canada at (416) 225-2121. In the United States and Puerto Rico, please call HOST at (770) 246-9889.

All associates can email the HOST team at [wfgghost@transamerica.com](mailto:wfgghost@transamerica.com).

## WFG Drive

WFG also provides you with a variety of mobile tools through WFG Drive, an app that allows you to perform a Financial Needs Analysis, run illustrations, and complete sales no matter where you are as long as you have Internet access. It also makes it easier for you to sign up new WFG associates through access to the electronic AMA (e-AMA).

## Business Builder Websites

WFG provides you with the ability to create a personalized website that is free of charge. This allows you to establish your brand and business online for free.

## Campaign Manager

Once you are licensed, the campaign manager helps you to create and manage a more effective sales and recruiting effort. You can organize your contacts, send emails to prospects, track their response and clearly measure the success of your campaign.



## Let's Get Started

Now that you have seen a sample of the assistance, tools and resources at WFG, begin building a business as large as your dreams. With these resources at your disposal, nothing is standing in the way of your drive and determination. You are your own boss, so take full advantage of all WFG offers, and let it empower you to take charge of your career and your financial future.