



Pathway to Success

From Associate to Executive Director

- Condensed Version •



The Pathway to Success

● Condensed Version ●

Table of Contents

<u>Chapter Name</u>	<u>Page</u>
Welcome Letter	3
First Steps	4
The Successful Steps - Initial Contact to Analysis and/or New Agent	9
The Successful Steps Process Summary – Say It – Send It – Sell It	23
The Client Coaching Session – Best Practices	28
New Agent Manual Resource Center	32
❖ Training Resources	
❖ Download Links to All Resources	





Congratulations and welcome to the UFinancial family. You have made a tremendous decision to be a part of a company that is committed to helping every individual, family, company and/or organization to achieve the goal of becoming completely debt free and to have the tremendous benefit of having a “Digital Financial Advisor” at their side for the rest of their lives. We are excited to have you working side by side with us. We will be sharing with you the proven guidelines, training processes and strategies of this amazing business opportunity. The leadership team at UFinancial is motivated in providing you a successful pathway to build a business that you can be proud of as you strive to achieve the goals and dreams for your future.

This is a tremendous company and the Money Max Account is continuing its’ history, which originally started in 2004, to help people from all walks of life to eliminate their debt, along with those who are adding new streams of income as agents with UFinancial (UFF). Our goal is to bring you the greatest business opportunity available in America. The \$8.5+ trillion financial industry is experiencing major changes and we are proud to say that UFF is leading the way.

Your new agent training program will provide the personal one-on-one and team training that you need to begin building your business. This will include field training, product and services knowledge, online and live business training classes and much more.

This “Pathway to Success” manual will guide you from your first day as an associate all the way to reaching the level of Executive Director and beyond. Always keep this manual available, so that you will have the information you need, at your fingertips, to accelerate your business to the levels that you desire to reach and then exceed.

Once again, welcome to United Financial Freedom. Let’s start your journey on the “Pathway to Success – From Associate to Executive Director”.





First Steps





The Pathway to Success

From Associate to Executive Director

Name: _____ Agent ID#: _____

My Support Team

Recruiter: _____ City/State: _____

Phone: _____ Email: _____

Certified Field Trainer: _____ City/State: _____

Phone: _____ Email: _____

Executive Director: _____ City/State: _____

Phone: _____ Email: _____

UFF Agent Support: 877-576-5563

Support@UFinancialFreedom.com

The Pathway to Success – First Steps

- SCHEDULE YOUR NEW AGENT ORIENTATION STRATEGY SESSION

DATE _____ TIME _____ LOCATION _____

- SET GPS1 APPOINTMENT TO RUN YOUR NUMBERS (Have Your Analysis Sheet Completed)

To Download the Analysis Worksheet: [CLICK HERE](#)

DATE _____ TIME _____ LOCATION _____

- SET GPS2 APPOINTMENT TO REVIEW YOUR DEBT FREE ANALYSIS RESULTS

DATE _____ TIME _____ LOCATION _____

- SCHEDULE YOUR MONEY MAX ACCOUNT PERSONAL COACHING SESSION

DATE _____ TIME _____ LOCATION _____

The Pathway to Success – Creating Your Foundation

“When you set forth a precise “Vision” or “Why” coupled with a well-designed and committed plan, this will produce within you an unequalled level of confidence, drive and an inner strength for success.” s.c.

Imagine that it is 3 years from today. Looking back, what would need to have happened for you to be genuinely happy with how your UFF business has impacted your life?

1. **WRITE YOUR “WHY”** Why are you part of this? What does it mean to you? Be specific.

MY “WHY” -

2. **GOALS – USE ACTIVITY COMPENSATION CALCULATOR!** – To Download – [Click Here](#)
 - a. How much do you need monthly? \$ _____
 - b. How long do you have to reach this? _____
 - c. Sr. Associate in 45 days: _____ Exec Dir. in 6 months: _____
 - d. Download Details of Associate to Executive Director in 6 Months: [Click Here](#)
3. **BUSINESS HOURS:** Mon: _____ Tues: _____ Wed: _____ Thurs: _____ Fri: _____ Sat: _____
4. **ACTIVITY LEVELS:** # Of Contacts per day: _____ per week: _____ per month: _____
5. **CONTACT LIST – Use the MEMORY JOGGER** Start a list of individuals who need to be debt free, people who need extra income, people looking for a new career. [Click Here](#)
6. **REVIEW SCRIPTS** and Role Play – Download Initial Prospecting Scripts – [Click Here](#)
7. **ACCOUNTABILITY**— What level do you want/need? Weak _____ Strong _____

8. **GETTING STARTED TRAINING** – Your first phase of training is set forth within a digital classroom. The “**Getting Started Training**” series is a set of nine videos to build your foundation and get you started on a solid pathway along with achieving success quickly. These videos, along with a vast array of resources for your UFF business are located in our Main Communications Portal: <https://UFFPowerTeam.com>.

Here are some action steps for you after you access the portal.

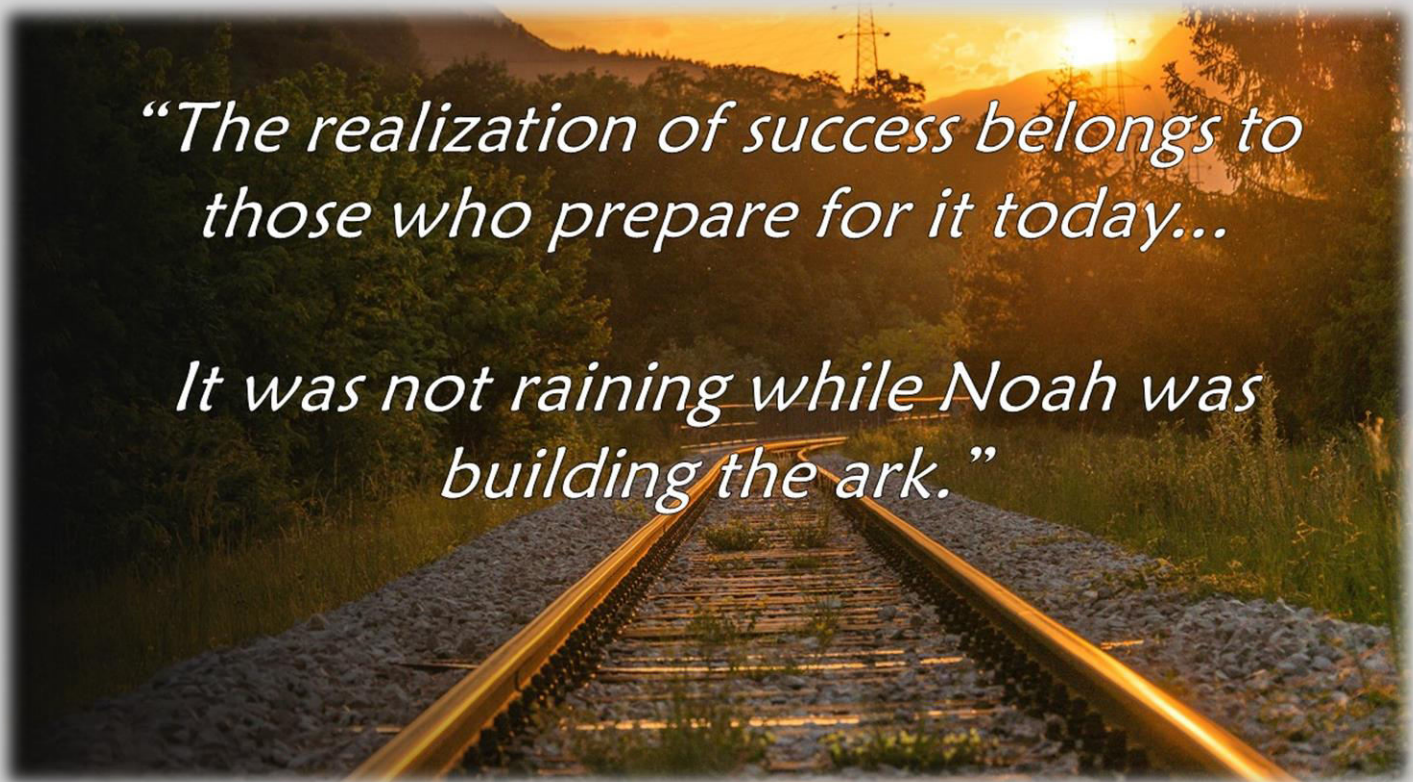
- a. Getting Started Training Series - Watch all videos within the first 48 hours (Menu Item – “*Getting Started Training*”) – [Click Here](#)
- b. Install Rapid Funnel (see item #2 in next section) and Watch Tutorial – [Click Here](#)
- c. Download Initial Contact Prospecting Script – [Click Here](#)
- d. Download Accountability Tracker – [Click Here](#)
- e. Download the Tri-Fold Success Guide – [Click Here](#)

9. **UFF AGENT BACK OFFICE** – Your UFF Agent Back Office has a wealth of information along with business tools that you will be referring to, interacting with and utilizing every day. Here is the access link: <https://portal.ufinancialfreedom.com/Account/Login>

- a. In the upper right-hand section of the back office you will see your name and are able to click on a drop-down list. Complete the following items
 - i. **Commission Payment Preferences** – Change the option from “Check” to “ACH” so that your commissions are directly deposited into your bank account. Just enter the routing number and account number.
 - ii. **Fill out your W-9 Form** – This needs to be completed and sent in to UFF to receive commissions. Email this to accounting@UFinancialFreedom.com or you can fax the completed form to 801-505-0228 – [Click Here for W9 Form](#)
 - iii. **Replicated Sites** – You are able to have your UFF agent websites customized. Enter your desired custom extension that will replace the agent ID number that is listed at the end of the site name. Make this a short and easy to remember name. i.e. First and Last Name or First Initial and Last Name. (JohnSmith or JSmith)
 - iv. **Change Password** – If you entered a “temporary” password when you first registered, change your password to a confidential one.

- b. Contact your sponsor and schedule to have your Debt Free Analysis run for you.
- c. Download and read the ***Debt to Wealth eBook***.
- d. Register for the UFF Corporate Training Calls for Agents held on Tuesday nights (Located under “Upcoming Webinars” in the lower left-hand area.)
- e. Take time to walk through the menus and sub-menu in your UFF back-office for a vast array of information and training documents.
- f. Download and read through the UFF Compensation Plan – [Click Here](#)
- g. Download and read through the UFF Policies and Procedures – [Click Here](#)
- h. In the bottom right-hand section of the home page is a section titled “Agent Training”. These are items that will assist you in all aspects of your UFF business.

Every day is an opportunity for you to enhance your successful UFF Business



“The realization of success belongs to those who prepare for it today...”

It was not raining while Noah was building the ark.”





**The Successful Steps
From Initial Contact to the
Analysis Appointment
and/or New UFF Agent**



The Pathway to Success

From Prospect to Client and/or New UFF Agent

“It is impossible to communicate face-to-face or voice to voice through a text or an email” s.c.

The first step to effective prospecting is to **personally** contact and speak with an individual, either in person, by phone or on Zoom. Then, **and only then** will the UFinancial Pathway to Success program along with our many powerful tools be effective for you and your business.

Business Tools Needed for Your UFF Prospecting

1. **Mobile Phone and Computer** – The Pathway to Success with UFinancial utilizes technology in every aspect of what we provide for all UFF agents. We also use many forms of business technology with every potential client to allow us to provide a Free Analysis for their customized Savings Report that will share with them how they can become a Money Max Account client and become debt free.
2. **Rapid Funnel App Download** – This mobile app is the business tool we use to share videos and other informational resources to all potential clients and potential UFinancial agents. Go to your app store and download the Rapid Funnel App or go to RapidFunnel.com on your computer and register there for your free account.
 - a. When you start the registration process and begin entering your account details, it will ask you for the group code. It is **ufinancial**. (case sensitive)
 - b. You will also be asked for your agent code/extension. This is the custom name you created for your UFF replicated websites (example: **UFFAgent**).
i.e. www.MoneyMaxAccount.com/UFFAgent
 - c. Create a username and password, for accessing the Rapid Funnel mobile app or the Rapid Funnel website.
 - d. **SET UP YOUR FREE ACCOUNT FIRST - Do not upgrade to the advanced version** until you have finished the basic free setup.
 - e. To upgrade to the advanced version for access to more videos, resources and functionality, log back in and go to the bottom right-hand area of the screen and click on “More”. Then go to “settings”, then “billing” to upgrade. (\$10/month)

- f. After you setup your Rapid Funnel account, go to the next item below and watch the tutorial video.
3. **Rapid Funnel Tutorial** – This is a detailed training tutorial of the Rapid Funnel program that is referred to in module #6 of the Getting Started Training Video Series mentioned in item 8a in the previous section.
 - a. To begin...Go and watch the video “**Rapid Funnel Tutorial by Steve Croft**”, which is a screen shot by screen shot training of how to use the Rapid Funnel app on your mobile phone. [Click Here to Watch Tutorial](#). As you watch this tutorial, you will see that the examples used for sending are with the text option. The same steps can be used for the “Email” option when sending videos or other resources. Either way, you will have tremendous success by using the Rapid Funnel App. Just follow each step in the tutorial and utilize the “email” option for sending videos or other resources in the same manner as explained for sending with a “text.”
 - b. This tutorial is designed for those who use a mobile phone for Rapid Funnel, If you are only using your computer for accessing Rapid Funnel, all resources mentioned in this manual are also available, and will be sent through the Rapid Funnel email service. However, this does not allow you to have a copy of the email in your “sent” record like you have in your normal email program when using your mobile device, so we strongly recommend using the mobile version which is how Rapid Funnel was originally designed for sending and communicating with prospective clients and agents.
4. **Calendly Online Calendar** – This allows you to have your calendar available online for everyone to easily schedule meetings with you. **Video Tutorial** – [CLICK HERE](#)
5. **Zoom Online Meeting Room** – This provides you a **FREE** online meeting room for prospecting and selling.
 - a. Go to <https://zoom.us/>
 - b. Click on menu item in upper right-hand area of screen “**SIGN UP, IT’S FREE**” (it is in a big orange banner box)
 - c. This gives you unlimited 1 on 1 meetings (2 total computers online at one time in a meeting)
 - d. If you have more than two people, then your meeting has a time limit of 40 minutes
 - e. If you want to upgrade, you can have unlimited meetings with up to 100 people per meeting for \$14.99 per month (a recent discount code of **urj-zoom** might still be available for the paid version)

6. **Personal Domain Name for Your Zoom Room (OPTIONAL)** – This will allow you to have people come to your room by just typing in a domain name (i.e. DebtFreeMeeting.com)
- Domain.com has domain names for \$9.99 per year (<https://www.domain.com/#/>). Use “sitehub” coupon code for discounts if they are available for your domain.
 - Choose a domain for your room. Make it an easy name to give people (i.e. AcmeOnlineMeeting.com, if your company name is Acme Group). Choose whatever you like and then go to the “Domains” drop down and choose “Search for Your Domain” to see if what you chose is available. If it is and you register it, no one else can ever take it away from you as long as you renew it each year.
 - If you choose to do this, once you have your personal domain registered and paid for, and you also have your Zoom online meeting account registered, you can set up your new domain name to have prospects and/or your agents access your Zoom meeting room with just one click.
 - To set up the “One Click” custom domain to access your Zoom room, just write down the URL of your Zoom “Personal Room” and then login in to your “Domain.com” account and choose the “Live Chat” help option and they will set up the “Forwarding of your Domain Name” to your Zoom Personal Meeting Room. You will provide them the Zoom URL that you wrote down and they will do the rest for you. This “Live Chat” support line will do this set up for you at no cost after you purchase your custom domain name.

• UFinancial and The Power of Business Technology •
The Right Tools with the Right Person
Produces Extraordinary Results



What Do You Say – What Do You Send

Follow These Steps With Every Prospect

What Do You Say?

1. Call your potential client (or have a meeting with someone in person) and have a short conversation with the express purpose of building an initial relationship and piquing the interest of the client to want more information about eliminating their debt.

2. As your conversation moves forward, before sharing what we can do for them, **you need to have a transition phrase or message that leads to presenting the UFinancial concept, story and program.** Use a unique or shocking question or statement. A perfect lead-in to this transition is when a person asks you, “And what are you doing now?” or “What do you do?” or “What are you doing these days” ... etc. **Then you transition...**
 - a. “Let me ask you a crazy question...”
 - b. “I am interested in getting your response to a very unusual question...”
 - c. “How has the current economy changed the way you handle your finances?”
 - d. “What is your Debt Free Date?”
 - e. “Do you own a home?”
 - i. “When will you have your mortgage paid off?”
 - ii. “What would it mean to you if that timeframe was reduced by 1/3 to 1/2?”
 - f. “What would you do if all of your debts were completely paid off?”
 - g. “How many people do you know that have monthly debt?”
 - h. “How many people do you know that would like to eliminate all of their debt?”

Ask any transition question or statement that piques their interest in a way that they in turn ask you a question or they are ready to hear more. At this point you are ready to move into the UFinancial Message.

3. When prospecting for a new UFF Agent, your transition questions might be different

- a. "Let me ask you a crazy question..."
- b. "How has the current economy changed the way you handle your finances?"
- c. "Do you keep your options open for additional streams of income?"
- d. "Are you open to making a significant part-time income if it didn't conflict with your full-time income?"
- e. "I work with a national company that is absolutely exploding. I am in charge of expansion and always looking for talented individuals?"
- f. "Is this your dream job, or are you open to other things?"
- g. "Do you like working in a position that helps people?"
- h. "Are you open to hearing about a business that can positively impact virtually every person in America in saving money and eliminating all of their debt?"
- i. "What is your Debt Free Date?"

4. After the Transition – You have many options of what you can say at this point to keep the conversation going, or you can go directly to the "Debt Free Question" listed in item #5 below. One option is to lead into the "Debt Free Question" by taking time to share your story about how the Money Max Account (MMA) helped you... or how the UFF Business has impacted you, or share a testimonial about one of your clients... or one from your trainer or one from one of their clients. This is not a lengthy conversation. You do not want to spend too much time with stories or info, this is the "INTEREST" phase and you want to capture their interest and then move on to the next step within the "Pathway to Success" program. Now is the time in the conversation to begin to create within your prospect their own personal interest in eliminating debt or sharing this with others by asking a few simple, yet powerful, questions. We want them to begin to see that United Financial Freedom can provide them the ability to live and enjoy the lifestyle that they truly want to live.

5. Then..... Introduce the concept of them being Debt Free.

a. "If I could show you how to pay off all of your debts (mortgage, student loans, car loans, credit cards, etc.) in as little as 1/3 to 1/2 the normal time without refinancing or restructuring your loans and without changing your budget or lifestyle, would you give me 20-30 minutes and watch a couple videos?"

b. After they respond with a "yes", confirm the sending of the videos.

i. "What I am going to do is send you a couple short videos to watch. If I send these to you, will you watch them?"

c. After they confirm with you that they will watch them, explain what will happen.

i. "Great, after you watch them, I will get back with you and discuss what you liked best. I will send these to you by email. Let me make sure that I have your correct email address."

ii. *****NOTE***** You can either provide an exact time to call them back (i.e. I will call you back this afternoon at 2:00 PM), or since Rapid Funnel notifies you as soon as they have watched the videos, you can tell them that you will contact them as soon as they have finished watching the videos.

d. You will then use the Rapid Funnel App that you just installed on your phone from the directions in the previous section on "Business Tools" to send them a series of videos to watch. If you have not installed Rapid Funnel on your mobile device yet, go back a few pages to the previous section on "Business Tools" and complete that process. The next section will walk you through which videos to send using the Rapid Funnel mobile app.

e. For a copy of the above scripts: [Click Here](#)

What Do You Send?

1. The UFinancial Videos that are programmed into the Rapid Funnel mobile app provide a professional overview of the Money Management and Debt Elimination concept, how it works with all types of debts and incomes as well as the ease of using the program without the need to be a financial expert.
2. After watching the Rapid Funnel tutorial video, you are ready to begin sending videos to your prospects.
3. The Pathway to Success program is a simple and proven process of generating interest with prospective clients and agents. This section of the program comprises sending three specific videos to every prospect in one text or email, which will present the basic concepts that you discussed with them in your phone conversation (or in person) in a clear and informative format. Yes, there are many videos in the Rapid Funnel mobile app, but as you begin... **use these three videos**. These videos have been tested and proven to produce the highest levels of performance and scheduling results for you as well as helping countless individuals to see the real possibility of becoming Debt Free.
4. Here are the three videos that you will send by using the Rapid Funnel Mobile App.
 - a. **Jane and Katie – Debt Elimination Overview** – This video is located in the “Potential Clients” section of Rapid Funnel in the “Pique Interest” folder. This is a 2 minute and 20 second video that provides a short, yet powerful overview of the debt elimination concept.
 - b. **The Financial Pathway From Debt to Wealth** – This video is located in the “Potential Clients” section of Rapid Funnel in the “Follow Up” folder. This is a 9 minute and 59 second video that uses a “Story Telling” format to provide a complete overview of how the Money Max Account uses powerful mathematical

strategies that have been used by the banking industry for years to allow anyone to eliminate any type of debt in a fraction of the normal time.

- c. **Debt Elimination Program Demonstration** – This video is located in the “Potential Clients” section of Rapid Funnel in the “Follow Up” folder. This is a 25 minute and 46 second video that walks through a detailed, yet easy to follow demonstration of the Money Max Account. The video uses real life financial situations that everyone encounters and how “informed” decisions, can provide benefits of tremendous savings in money and time and allow a person to live the lifestyle that they truly want to live.

5. When sending these through Rapid Funnel, you want your text or email to be professional to reflect the proper image of your business and UFF. You are able to use a text or email option for delivering the videos to your prospective client. As you saw during the Rapid Funnel Tutorial (if you have not watched the tutorial yet, [Click Here](#)), the Rapid Funnel mobile app will allow you to enter a custom message before the video links that are populated into your text to email after you choose the three Pathway to Success videos to send. **See the “NEW AGENT MANUAL RESOURCE CENTER” located at the end of this manual for the email and text templates that you can download and then copy and paste into your Rapid Funnel email or text.**
6. After you send the text or email with the three customized video links generated by Rapid Funnel to your prospect, if you do not see any viewing activity within 30 minutes or have not received any notifications from Rapid Funnel about that prospect within that timeframe, it is possible that they have not seen the email or text. It is also possible that the email went into their spam or junk folder or the text got lost in their many texts they have received. If this occurs, you need to send them a quick text to confirm that they have successfully received the email or text and were able to open and view the videos. **The RESOURCE CENTER has a template of the follow up text to send.**

7. If they reply that they have not received the email or text, reply back in a text that you are calling them. Call them immediately and walk them through searching for the email in their spam or junk folder as well as searching through their text list. This does two things. First, it shows them that you care and second, you have made another personal contact (or process impression) which creates a stronger relationship. After you find the email or text, have them click on “Jane and Katie” and tell them to go ahead and watch the video as it is only two minutes long and that you will wait. Then tell them to watch the other two and that you will call them back in 45 minutes to see what they liked best.

8. When you call back – Ask them **“What did you like best?”** and whatever they say, compliment them and say many of your clients recognized and noted the same point. Let them talk a little and then tell them, ***“I can see from your comments that you are interested in seeing more about eliminating your debt. The next step is to see what your savings numbers would be and how quickly you could be debt free. Let’s look at our calendars and schedule a time for your Free Customized Savings Report, I have an opening tomorrow afternoon and the following morning, which would be best for you?”***

9. When you are prospecting for a New UFF Agent, the **first** three videos that you send are the same three that you send to a potential Money Max Account (MMA) client by using the Rapid Funnel Mobile App. These three videos provide a potential UFF Agent a clear picture of the powerful MMA Program that is the foundation of the UFF Business Opportunity. **In addition to these three videos**, once you follow up with your prospect, you will then be able to send some additional business-oriented opportunity videos to provide a message of how the UFF Business can enhance their goals and objectives . The first one that we recommend provides an interview with the founders of UFinancial that will appeal to every potential UFF Agent. The others have a focused customized message to any potential UFF Agent that is currently in the financial services sector.

Additional Videos To Send To Prospective UFF Agents

- a. **Why UFinancial – Debt Freedom – The Great Discovery** – This video is located in the “Independent Agent” section of Rapid Funnel in the “Follow Up” folder. This is an 8 minute and 17 second video that shares a wonderful conversation with the two founders of UFinancial, John Washenko and Skyler Whitman. They provide a clear picture of why they began this company along with their passion and commitment to helping people all across America to have a better life by eliminating the burden of debt and to have a life of freedom.
- b. **Financial Professionals - Industry Specific Videos** – This is a series of 5 videos with each one focusing on a specific financial sector. These are located in the “Independent Agent” section of Rapid Funnel in the “Pique Interest” folder. The videos range from 7 to 14 minutes in length. Each one is specifically designed to share a detailed message to that professional how the UFinancial program and the Money Max Account complements as well as enhances their specific financial business. The video shares numerous avenues of providing additional services to their existing clients as well as new clients. It even discusses how they can impact their entire client base and enhance each client’s financial goals and objectives. As these are designed for when you are speaking with a financial professional, you would add the video that best matches their business or profession and add that one video to the other ones listed above.
 - i. **CPA** – 6 minutes and 52 seconds
 - ii. **Insurance** – 8 minutes and 3 seconds
 - iii. **Mortgage** – 13 minutes and 40 seconds
 - iv. **Real Estate** – 9 minutes and 28 seconds
 - v. **Securities** – 7 minutes and 27 seconds

10. Once you have discussed the videos and are ready to schedule their Debt Free Analysis, you can contact your Certified Field Trainer to verify what days and times are available for you to schedule the Free Savings Report Appointment (we call this GPS1) or many of the trainers use an online scheduling program to allow you to easily see what is available for you to schedule your prospect's GPS1 appointment and go right ahead and schedule the appointment and confirm it with the prospect.

11. Once the GPS1 appointment is scheduled, you (or your CFT) will send the prospect a personalized email confirming the date and time of the appointment, the Zoom details along with the "Debt Free Analysis Worksheet" ([Click Here](#) to download the worksheet). **Never...Never...Never** send the worksheet to a prospective client until **AFTER** the GPS1 appointment is secured and on everyone's calendar. If you send it before the GPS1 appointment is set, the prospect can possibly use that as an excuse to not schedule the appointment until they have time to completely fill it out. **The RESOURCE CENTER has a template of this email for you to download and then copy and paste into your email program to send to your prospect.**

12. After you send the GPS1 appointment confirmation email to your prospect, send a text 30 minutes later to confirm that they received the email and the worksheet. **The RESOURCE CENTER has a template to download of the follow up text to send.**

13. Send the prospect a reminder text of the GPS1 meeting 30 minutes before the meeting. **The RESOURCE CENTER has a template to download of the GPS1/2 meeting reminder text to send to your prospect.**

14. As a new agent, as well as when you become a trainer, we recommend a pre-meeting and post-meeting briefing. When working with your Certified Field Trainer, schedule to meet 15 minutes before the prospect arrives, to discuss the prospect and the process

that has brought them to the GPS1 analysis meeting. Also, this is the time to practice how to introduce your trainer to your prospect and your prospect to your trainer. This is also the time to discuss what areas within the GPS1 meeting that you need to focus on and take notes. *You should watch for at least three items that you really liked during the GPS1 meeting and then at least three items that you would like clarification on and explanation of that occurred during the GPS1 meeting. The final item should be an idea or possible suggestion of what you would have done differently if you had been at the helm of the GPS1.* We can all learn from each other. There are always teaching points and discussion items that allow the GPS1 meeting to be very productive. Then the 15 minutes after the meeting is dedicated to teaching and education for the you as the new agent as you discuss the items that you wrote down during the GPS1 appointment.

15. At the end of the GPS1 meeting, the GPS2 appointment is scheduled to review the custom analysis results. You will inform the prospect that they will be receiving an email with the details of the next meeting along with a video that will prepare them for that meeting. You want them to confirm that they will watch the video. Let them know that they will truly enjoy the video as it will provide a complete overview of what has been discussed to this point, and what will be shared when you present the analysis results. Once the GPS2 appointment is scheduled, you (or your CFT) will send the prospect an email confirming the date and time of the appointment, the Zoom details and the video. **The RESOURCE CENTER has a template to download of this email for you to copy and paste into your email to send to your prospect.**
16. Send the prospect a reminder text of the GPS2 appointment 30 minutes before the scheduled meeting. **The RESOURCE CENTER has a template to download of the GPS1/2 meeting reminder text.**

17. Once again, we recommend that you have a pre and post briefing meeting with your Certified Field Trainer (CFT) for the GPS2 Appointment.
18. If you decide to have a GPS3 meeting, follow the same process for planning and communication as you did with GPS1 and GPS2.
19. When your prospect purchases the Money Max Account at the end of your GPS process, you will schedule their Personal Client Coaching Session for them. Once they have purchased the program, they need to get started properly and have it set up to match their analysis results, their personal financial picture, and their lifestyle. For details on what to send to your new client pertaining to their coaching session along with the instructional document to download and send to your client, **Go to the Chapter** within this manual titled ***“The Pathway to Success – The Client Coaching Session”***.
20. With this also being a prospective agent, once they have seen all of the videos and have completed their Free Savings Report Analysis, they will clearly see the tremendous potential of being an agent. If you have not already done so, invite them to a UFinancial Business Overview webinar and register them as a new UFF agent. This manual will guide them as they start their new United Financial Freedom Career. **The RESOURCE CENTER has a downloadable template of a Welcome Email for your New Agent.**





**The Successful Steps
Process Summary
Say It - Send It - Sell It**



The Pathway to Success

The Entire Process

Say It – Send It – Sell It

“The greatest success comes about by studying a proven plan, believing in that proven plan, committing to that proven plan, following that proven plan with every ounce of effort you have and never allowing anything or anyone to pull you away from that proven plan ” s.c.

Now that you have studied the detailed steps of **“What Do I Say?”** and **“What Do I Send?”**, which you follow with every person you contact, it is time to commit to the Pathway to Success process. With every person you reach out to as you share the tremendous UFinancial story, program, and opportunity, focus on following the **proven step by step process** within this manual. This will provide you a simple and repeatable process that will ensure you the highest level of performance, productivity, and results with every person you contact.

Once you have this Pathway to Success process firmly in place within your business and then make a **personal commitment to follow it every time**, whether it be with a prospective MMA client or a prospective UFF agent, you will achieve and then exceed every goal and objective you have with your UFinancial business.

On the following three pages, we will present a simplified step by step summary of the entire process that has been detailed up to this point, so that you will always be able to see what the next step is as you share the United Financial Freedom business and programs.

The Pathway to Success

The Entire Process

Say It – Send It – Sell It

1. **Your List** - Build your list using the “Memory Jogger” along with all of the databases and contact lists you have created in your business and personal life.
2. **Initial Contact** - Use as many tools and resources available (LinkedIn, Facebook, Text, Network organizations, etc.) to initially reach out to your prospects with the “ultimate goal” of having a personal conversation with them in person, on the phone or by Zoom.
3. **First Meeting** - Have a personal meeting either in person, on the phone or with Zoom.
4. **Build a Relationship** - Use the personal meeting to begin to develop a relationship and to learn more about them and for them to know more about you.
5. **Create Interest in Debt Elimination** - Begin to ask questions that will “Pique Their Interest” in Debt Elimination by using a transitional phrase or question (i.e. “Let me ask you a crazy question”)
6. **The Question** - Use the UFinancial script to ask the question, “If I could show you....”
7. **Videos** - Offer to send them some short videos
8. **Confirmation to View the Videos** - Confirm that if you send them, they will watch them. Then, let them know you will follow up after they finish viewing the videos to see “what they liked best”.
9. **Send them the three “Pathway to Success” videos** - Text or email using Rapid Funnel
 - a. Jane and Katie – Debt Elimination Overview
 - b. The Financial Pathway From Debt to Wealth
 - c. Debt Elimination Program Demonstration

10. **Follow Up Text** - Send a text to them after the Rapid Funnel email or text has been sent to verify that it arrived successfully and that they are able to view the videos.
11. **If they did not receive the videos**, call them and help them find the email or text and then have them watch the Jane and Katie video while you are on the phone with them.
12. **Follow Up Phone Call** - Call back and follow up as soon as Rapid Funnel notifies you that they have viewed the videos and ask them “What did you like best?”
13. **GPS Appointment** - After you discuss what they liked best, follow the script to schedule their appointment for their Free Savings Report Analysis (the GPS Selling System).
14. **Confirm Appointment with CFT** - Confirm the dates with your Certified Field Trainer.
15. **Send Email Confirmation to Prospect** - After the GPS appointment is scheduled, (either you or your CFT) send a confirmation email to the prospect with the date, time, Zoom information, etc. along with the “Analysis Worksheet”
16. **Send a confirmation text for the GPS1 meeting** – Send this 30 minutes before the meeting begins. If the appointment was scheduled many days in advance send one 24 hours ahead and then another 30 minutes ahead. A phone call is also an excellent option to ensure that the worksheet has been completed and the time is still confirmed.
17. **Pre and Post Appointment Training Session** – We recommend that you schedule a 15-minute pre and post GPS appointment with your Certified Field Trainer to prepare for the GPS meeting and then to have a review afterwards for detailed training.
18. **Schedule GPS2 appointment** - At the end of the GPS1 appointment, schedule the GPS2 appointment and inform the prospect that they will receive an email and a video so that they will be prepared for the 2nd appointment when the analysis results are presented.
19. **At the end of the GPS2 appointment** - Schedule a GPS3 appointment if needed. If not, and the prospect purchases the Money Max Account, congratulate them, schedule their Personal Client Coaching Session. **Go to the Chapter** within this manual titled “*The Pathway to Success – The Client Coaching Session*” for email and document template.

20. Register as a UFinancial Agent - If they also register as a new UFF agent, send them a welcome email and schedule an “Onboarding Meeting” to present and walk through this New Agent Manual. See below for the steps to register your new UFinancial Agent.

Registering Your New UFinancial Agent That You Recruited

- 1. Follow the Pathway to Success Steps** - Follow the same steps listed above that have been provided for every prospective client or UFF agent to allow your prospect to clearly see the UFinancial Business Opportunity.
- 2. Register New Agent** - To register a prospect as a UFF agent, you either direct them to your Personal UFF Opportunity website (<https://UFFOpportunity.com/YourPersonalURL>) and give them directions on the simple registration process, or you can access your UFF opportunity site yourself and complete the registration process with them.
- 3. Welcome new UFF Agent** - Once they are registered and have a UFF agent number, welcome them to the UFF family and let them know that you will be sending them a welcome email with the first steps of getting started.
- 4. Onboarding Appointment** - Schedule their “Onboarding Meeting” within the first 24 hours and send them their welcome letter. **Go to the “New Agent Manual Resource Center” for a downloadable template of a Welcome Email for your New Agent.**
- 5. New Agent Manual** - The “Onboarding Meeting” will be focused on presenting and walking through this “New Agent Manual” and to set their goals and objectives for the first 30-60-90 days to help them to get off to a fast start.





The Client Coaching Session





The Pathway to Success

The Client Coaching Session – Best Practices

Why is coaching important?

It is not about the sale for you or UFF. The personal coaching session is all about the new client with United Financial Freedom. This teaches them how to get started on the pathway of eliminating all of their debt and learning how to use the MMA as their Digital Financial Advisor for the rest of their life.

UFF Agents and Corporate Coaches are partners...equally educating the client on the MMA program.

It's extremely important that you, as the UFF Agent, present a live and engaging demonstration of the MMA program and how it works, so that the client sees the power and the ease of use of this award winning program.

Client Success = Company Success = Our Success

After the client purchases their MMA program, there is another very important step that needs to be accomplished... scheduling their personal 90-minute coaching session so that this is confirmed on their calendar. It is very easy to schedule this.

Once you finish the sales process and create their username and password, the next screen that is displayed is the coaching session scheduling page.

Select a date on the left, and the times available will pop up on the right.

Once you have the client scheduled for their personal coaching session, add this to your calendar as well, so that you can touch base afterwards to see what they liked best about their session and to see if they have any questions. If they have a lot of MMA “functionality” questions, encourage them to schedule another coaching session.

To ensure that your new client's coaching session is as productive as possible, send them an email congratulating them on their new Money Max Account with an attachment of preparation instructions, walking through the “Set-Up Wizard” and a monthly budget worksheet. You can download that [email template](#), the instructions document and the monthly budget worksheet from the **RESOURCE CENTER** at the end of this manual.

Call – Email – Live Chat – Available To All MMA Clients

Call, Email, or Live Chat...whichever works best for your clients! They are able to get their questions answered so they can understand the process before their Coaching Session.

If the Set-Up Wizard is not done, they may need multiple Coaching Sessions to complete their onboarding process for their new MMA program. Remember, our MMA clients may schedule multiple Coaching Sessions.

Going through the Set-Up Wizard process will ensure that your clients know how to log into their account and will also provide for a much smoother Personal Coaching Session.

As your clients go through the Set-up Wizard, they will be able to label the accounts the way that they will want them identified when their account goes live.

Send The Monthly Budget Worksheet

If the client charges most of their monthly expenses on a credit card and does not want to know the monthly details of their spending, they don't need to itemize their budget. They can simply enter in one line item for their Credit Card monthly bill. This process is for those who pay for the majority of their monthly expenses on the credit card and pay off that entire credit card balance (or cards) every month.

The Monthly Budget Worksheet is for those who want to itemize their monthly expenses and generally pay for them from their bank accounts. They want to see and record every possible monthly expense to determine where their income is being spent.

The Coaching Session is like building a house. The Coaches will “build the house” so that all your client has to do is “move in.” The Budget Worksheet is sent to the new Money Max Account (MMA) client after they purchase their MMA program and before their Personal Coaching Session. This will allow them to prepare a rough budget of monthly bills coming out of checking/savings accounts. [Click Here to Download Worksheet](#)

If clients have more than one checking and one savings account, they need to specify which account their paychecks go into and which accounts their bills get paid from each month. This can be done on the Budget Worksheet.

Caller ID

Coaching calls frequently go to voicemail if the coach is calling a client's cell phone that has spam filters installed. Let clients know to remove spam filters from cell phone.

Recommend that the client save the Customer Support # in their cell: **877.676.5638**

The client's Caller ID may say "UFF" or "UFinancial"

Account Connect

This an **optional** monthly service that connects the client's Money Max Account with over 13,000 financial institutions that will automatically download the client's transactions into their Money Max Account Action Plan.

This service will pull the data into the Money Max Account, and then the client will need to "Accept" the transaction data (called "execute" within the program).

Remember, **NOT ALL** financial institutions are connected to this optional program called "Account Connect". Credit Unions, some credit cards, and local vendors (gas company, local utilities, electric, etc.) may not be connected to be able to pull that data into the client's Money Max Account. If that is the case, the client will have to manually update those transactions. This is not a service that covers all institutions, nor transactions! It costs \$13.95/month and is not a profit center for UFinancial.

Additional Information

Coaching sessions are 1.5 hours long. If a coach is running late, another coach will call the client to let them know their coach is running late.

Agents are **NOT** to be on the coaching call as this slows down the coaching process.

When in doubt about this process, call your upline, CFT, Executive Director, or Field Partner, NOT the Home Office.





New Agent Manual

► Resource Center ◀



The Pathway to Success

Training Resources

WEBSITES

Agent Back Office: <https://portal.ufinancialfreedom.com/Account/Login>
Agent Training: <https://uffpowerteam.com/>
MMA Login: <https://login.moneymaxaccount.com/>
Team Zoom: <http://TomsWebRoom.com/>
Rapid Funnel: <https://RapidFunnel.com/>
Zoom Accounts: <https://Zoom.us>
Calendly Program: <https://Calendly.com>
Opportunity Site: <https://UFFOpportunity.com/YourCustomName>
Money Max Site: <https://MoneyMaxAccount.com/YourCustomName>
MMA Video Site: <https://MoneyMaxAccount.com/YourCustomName/videos>

ONLINE TRAINING AND TEAM MEETINGS

Refer to Team Calendar at <https://uffpowerteam.com/>

Every 1st and 3rd Monday evening of each month at 8:00 PM ET – Different UFF Leaders present a National UFinancial presentation focusing on various sectors of the Financial Industry, Corporate Environments, Local and National Organizations and more. These cover areas such as Real Estate, Mortgage, Loan Officers, Insurance, Securities, Churches, Small Businesses and more, sharing the many benefits available for collaboration between UFinancial and these various Business Sectors. The Zoom room is www.TomsWebRoom.com. Invite as many guests as you like. It generally lasts about 30-35 minutes.

Every 2nd and 4th Monday evening at 8:00 PM ET – Mac Saunders of the UFinancial Corporate Team hosts a Money Max Account Client Presentation. You register for this in your UFinancial Agent Back Office. This presentation generally lasts about 45 minutes.

Every Tuesday afternoon at 2:00 PM ET – Different UFF Leaders present the National UFinancial Corporate Business Overview presentation. The Zoom room is www.TomsWebRoom.com. Invite as many guests as you would like to have attend. It generally lasts about 30-35 minutes.

Every Tuesday evening at 8:00 PM ET – The UFinancial Corporate Team hosts a National Agent Training along with providing company updates and announcements. You register for this in your UFinancial Agent Back Office. This training meeting lasts about one hour.

Every Wednesday evening at 8:00 PM ET – Tom Keener (The very first UFF Agent and our Team's Master Trainer) ... hosts a weekly national team online meeting to share ideas, national announcements, contests, recognition of individuals, and much more. The Zoom room is www.TomsWebRoom.com. This meeting is for UFF Agents only. It generally lasts one hour.

Every Thursday evening at 8:00 PM ET - Different UFF Leaders present the National UFinancial Corporate Business Overview presentation. The Zoom room is www.TomsWebRoom.com. Invite as many guests as you like. It generally lasts about 30-35 minutes.

Mornings (Mon, Tues, Thurs, Fri) at 10:00 AM ET – This is a **national round table discussion for training, product info and much more**. The Zoom room is www.TomsWebRoom.com. This is a come and go session that is packed with great info. It lasts about 90 minutes depending on where the conversation and participation goes.

Monthly – Fast Start Training School – This is held once a month on a Saturday (the schedule will always be posted on the Main Communication Portal – <https://UFFPowerTeam.com>). Over a power packed four hours being broadcast online, you will be provided some of the highest levels of information, training and experience from a series of speakers who are some of the most successful leaders in the company They will be sharing professional and proven skills that you can implement immediately. This is a fast paced and extremely professional business school that will have a tremendous impact on the growth and success of your UFinancial business. When this Training School is held live, it is held across the country in different cities over two days and expands even further into areas of training and business skills to assist you in building a successful United Financial business.



The Pathway to Success

Links to All Resources in the Manual

First Steps Documents

Activity Compensation Calculator	Download to Print – Click Here
Assoc. to Exec. Director in 6 Months	Download to Print – Click Here
Memory Jogger	Download to Print – Click Here
Initial Prospecting Scripts	Download to Print – Click Here
Getting Started Training Videos	Download to View – Click Here
Rapid Funnel Tutorial	Download to View – Click Here
Accountability Tracker	Download to Print – Click Here
Tri-Fold Success Guide	Download to Print – Click Here
W-9 Form for Commissions	Download to Print – Click Here
UFF Compensation Plan	Download to Print – Click Here
UFF Policies and Procedures	Download to Print – Click Here

From Prospect to Client and/or New UFF Agent

Rapid Funnel Tutorial	Download to View – Click Here
Initial Prospecting Scripts	Download to Print – Click Here
Rapid Funnel Texts and Emails	Download to Print – Click Here
Rapid Funnel Text for Follow Up	Download to Print – Click Here
Email to Schedule GPS1 Appointment	Download to Print – Click Here

Debt Free Analysis Worksheet

Download to Print – [Click Here](#)

Text to Follow up on GPS1 Email

Download to Print – [Click Here](#)

GPS1 Appointment Reminder Text

Download to Print – [Click Here](#)

Email to Send Between GPS1 & GPS2

Download to Print – [Click Here](#)

GPS2 Appointment Reminder Text

Download to Print – [Click Here](#)

Email to Client After MMA Purchase

Download to Print – [Click Here](#)

Client's Coaching Session Instructions

Download to Print – [Click Here](#)

Coaching Session Budget Worksheet

Download to Print – [Click Here](#)

New Agent Welcome Email

Download to Print – [Click Here](#)

“The greatest opportunity begins with you, and will grow beyond your expectations when you share it with others” s.c.





Pathway to Success

From Associate to Executive Director

"There is a powerful driving force inside every human being that, once unleashed, can make any vision, dream, or desire a reality."

Anthony Robbins

