



# Kick-Start Guide

These are the first steps in getting you to your “Z” position. This will be a guide to get you up and running as quickly as possible. You will also be working with our team throughout this process. Items have links embedded for your convenience.

## Week 1

	Sales	Operations	Marketing
<b>Day 1</b>	Retirement Seminar Part 1 <ul style="list-style-type: none"> <li><a href="#">1.01 Introduction</a></li> <li><a href="#">1.01 Introduction “New”</a></li> </ul>	<a href="#">Set training debrief and Licensing conversation</a> for this week with Andy (Next two days)	
<b>Day 2</b>	<a href="#">Retirement Seminar Part 1</a> <ul style="list-style-type: none"> <li>1.02 Medical Care in Retirement</li> <li>1.03 Long-Term Care</li> <li>1.04 Transfer on Death</li> <li>1.05 Longevity Risk</li> <li>1.05.1 Updated life expectancy tables</li> </ul>	<ul style="list-style-type: none"> <li><a href="#">Review Longevity 2.0 Videos (All 7)</a></li> <li>Get access to BHFM training website (email sent)</li> <li>Get access to Longevity Software (Email Sent)</li> </ul>	
<b>Day 3</b>	<a href="#">Retirement Seminar Part 1</a> <ul style="list-style-type: none"> <li>1.06 Taxable Classifications on Investments</li> <li>1.07 Inflation</li> <li>1.08 Investments in Retirement</li> <li>1.09 Financial Advisors</li> <li>1.10 Private Pensions</li> </ul>	<ul style="list-style-type: none"> <li><a href="#">Schedule a Zoom call with Andy</a> to walk through software program (have existing client in mind to build plan for)</li> <li>Get access to <a href="#">Financial Planning Data form</a> to use as fact finder</li> </ul>	<a href="#">Schedule Call with Ben</a> to start A-Z plan
<b>Day 4</b>	Review training video: <a href="#">Make Money Now with Longevity</a> . <a href="#">Retirement Seminar Part 2</a> <ul style="list-style-type: none"> <li>2.01 Maximizing Social Security Benefits</li> <li>2.02 Income Stream in retirement2.03</li> <li>Income Stream in Retirement (continued)</li> <li>2.04 Running out of Money</li> <li>2.05 Income planning</li> <li>2.06 Market Losses</li> </ul>		<a href="#">Send Ben an email</a> with all the marketing you have attempted/done in the past and your current marketing efforts.

# Week 1 (continued)

Sales		Operations	Marketing
<b>Day 5</b>	<a href="#">Retirement Seminar Part 2</a> <ul style="list-style-type: none"> <li>2.07 Case Studies Part 1</li> <li>2.08 Case Studies Part 2</li> <li>2.09 Case Studies Part 3</li> <li>2.10 Case Studies Part 4</li> <li><a href="#">2.11 Summary "New"</a></li> </ul>		

# Weeks 2 - 4

Sales		Operations	Marketing
<b>Week 2</b>	<a href="#">First Client Meeting</a> (All 20 lessons)  <a href="#">First Client Meeting Snippets</a> (All lessons)	<ul style="list-style-type: none"> <li>Longevity meeting with Andy</li> <li>Schedule <a href="#">LinkedIn meeting</a> with Andy</li> </ul>	<ul style="list-style-type: none"> <li>Hold A-Z plan meeting with Ben</li> <li>Review <a href="#">Educational Workshop Overview</a> and download <a href="#">Workshop checklist</a>.</li> <li>Build list of Schools &amp; begin outreach for availability.</li> </ul>
<b>Week 3</b>	<a href="#">Retirement Seminar Part 1</a> (All Lessons)  <a href="#">Retirement Seminar Part 2</a> (All Lessons)	<ul style="list-style-type: none"> <li>Meet with Andy &amp; set up LinkedIn program in <a href="#">Linked Campaign Overview</a></li> <li>Segment your Client base for Money Now reviews Leveraging the <a href="#">Money Now Campaign Overview</a></li> <li><a href="#">Review Sample Folder Training</a></li> </ul>	<ul style="list-style-type: none"> <li>Firm up list of 3-4 locations. Send to Ben. He will reach out to the mail company to identify the ideal starting location(s).</li> <li>Schedule location and dates for first 101 workshop with location and confirm with PowerMails</li> </ul>
<b>Week 4</b>	<a href="#">2<sup>nd</sup> Client Meeting</a> (All Lessons)	<ul style="list-style-type: none"> <li><a href="#">Review Pending Business report Training</a></li> </ul>	<ul style="list-style-type: none"> <li>Daily – Run LinkedIn procedure</li> <li>A-Z plan review with Ben</li> <li>Begin outreach to clients for Longevity reviews</li> <li><a href="#">Download PowerPoint presentation for 101</a> and rebrand and send through compliance as needed</li> </ul>



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Here is a list of key people at BHF M. Feel free to reach out to any of our team members for help or questions.



Scott Brooks

Business  
Building

[sbrooks@fta-ria.com](mailto:sbrooks@fta-ria.com)



Gordon Haave

RIA Investment  
Strategy

[ghaave@fta-ria.com](mailto:ghaave@fta-ria.com)



Ben Quinney

Marketing  
Planning and  
Strategy

[ben.quinney@bhfm-fmo.com](mailto:ben.quinney@bhfm-fmo.com)



Andy Dodge

Product &  
Longevity

[adodge@bhfm-fmo.com](mailto:adodge@bhfm-fmo.com)



Matt Dorman

Media Buying &  
Production

[matt.dorman@bhfm-fmo.com](mailto:matt.dorman@bhfm-fmo.com)



Janet Karez

Event &  
Marketing  
Operations

[janet@fta-ria.com](mailto:janet@fta-ria.com)



Mark Herman

Team & Assistant  
Training

[mark.herman@fta-ria.com](mailto:mark.herman@fta-ria.com)



Mark Kukielski

Plan Building &  
Advisor Training

[mark@fta-ria.com](mailto:mark@fta-ria.com)