

ELEVATE WORKSHEET



Issuing Life Insurance Policies

Setting Customer Expectations

The Underwriting Process

Navigating Rate Changes

Policy Delivery

ELEVATE WORKSHEET



Upcoming Classes

- ❖ March 23-24: Evolve II Service
- ❖ March 25: Quick Hit - Truths I Wish I Knew As A New Hire
- ❖ March 26: Elevate - The Internet Lead Process
- ❖ April 1: Quick Hit - Overcoming Step One Objections
- ❖ April 2: Elevate - New Hire Training Plan
- ❖ April 7-9: Evolve

Trophy Club Links



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