



Midwest Chicago EC- I Homework

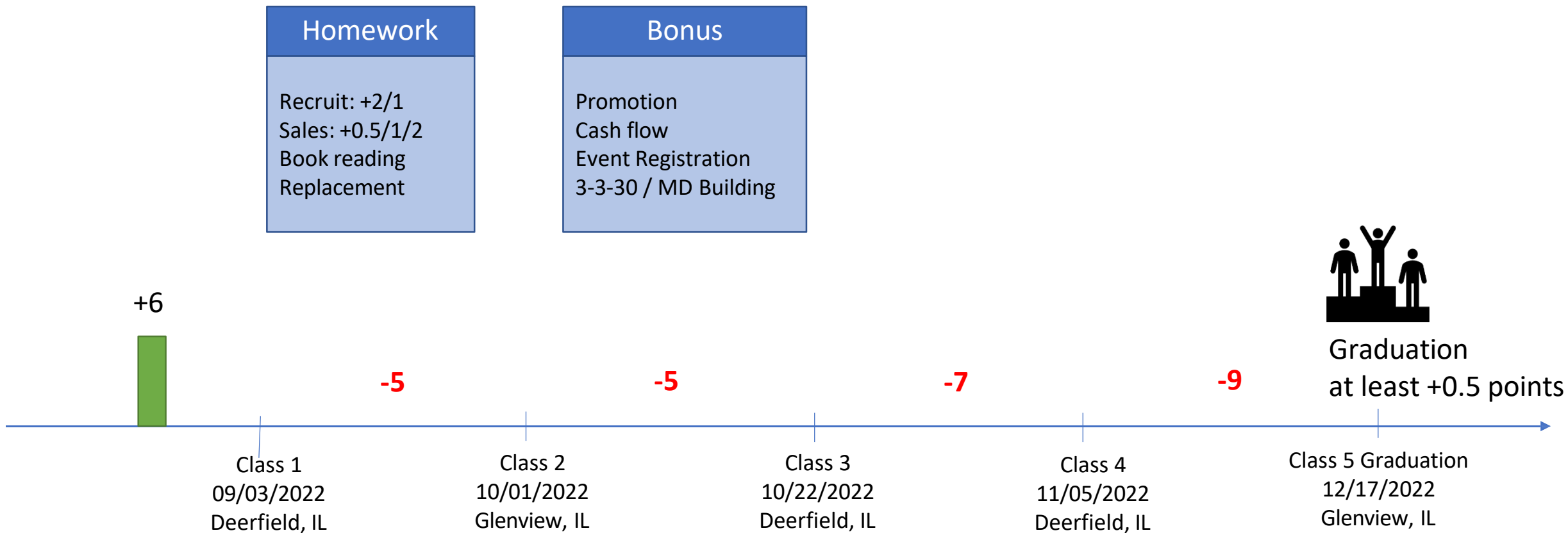
EC Preparation

- Paperless system
 - <https://www.midwestchicagoec.com/>
 - Online submission homework
 - Scoreboard
- State-of-the-art equipment
- Organic training materials tailored for cadets from top CEO & above
- Registration – by 09/03/2022
 - 1st class: 09/03/2022, 1:00 PM CST
- Must be WFG Associates
- Registration Fee: \$200 (single) / \$200 for couple

Protocol

- Dress Code: **Business Formal or EC Graduation Shirt**
- Pen, Notebook (**no computer or tablet**)
- Name badge (prepared by EC advisory team)
- On-time & No Excuse
- No Saving Seats
- Kids are not allowed in EC room
- Mute or turn off cell phones.
- Respect to organizers, trainers and each other
- Need help?
 - Homework related: using “Appeal” link on EC homework page
 - Other logistic issues: EC cadets contact with your SMDs. SMDs can contact EC assistant thru Telegram

Midwest Chicago EC- I Class



Homework - Sales/Helping family:



IRA
 TERM
 IUL
 Annuity
 ...

Writing Agent:

Producer/Trainer, name shown on the last page of application form
 Writing agent is responsible to submit case homework to

Splitting Agent:

Agent shown on 'producer certificate'

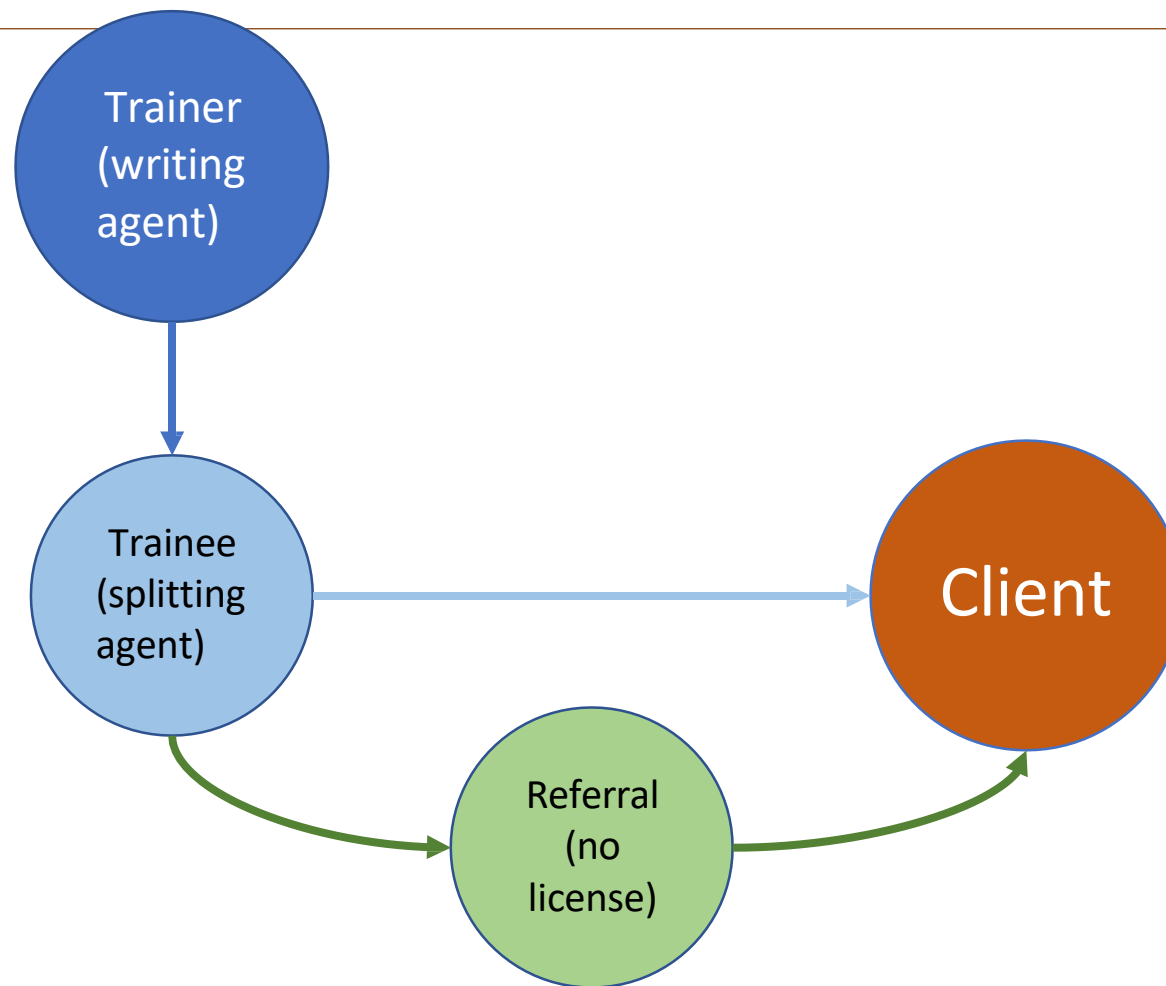
Referral Agent:

Direct referral agent, no license yet

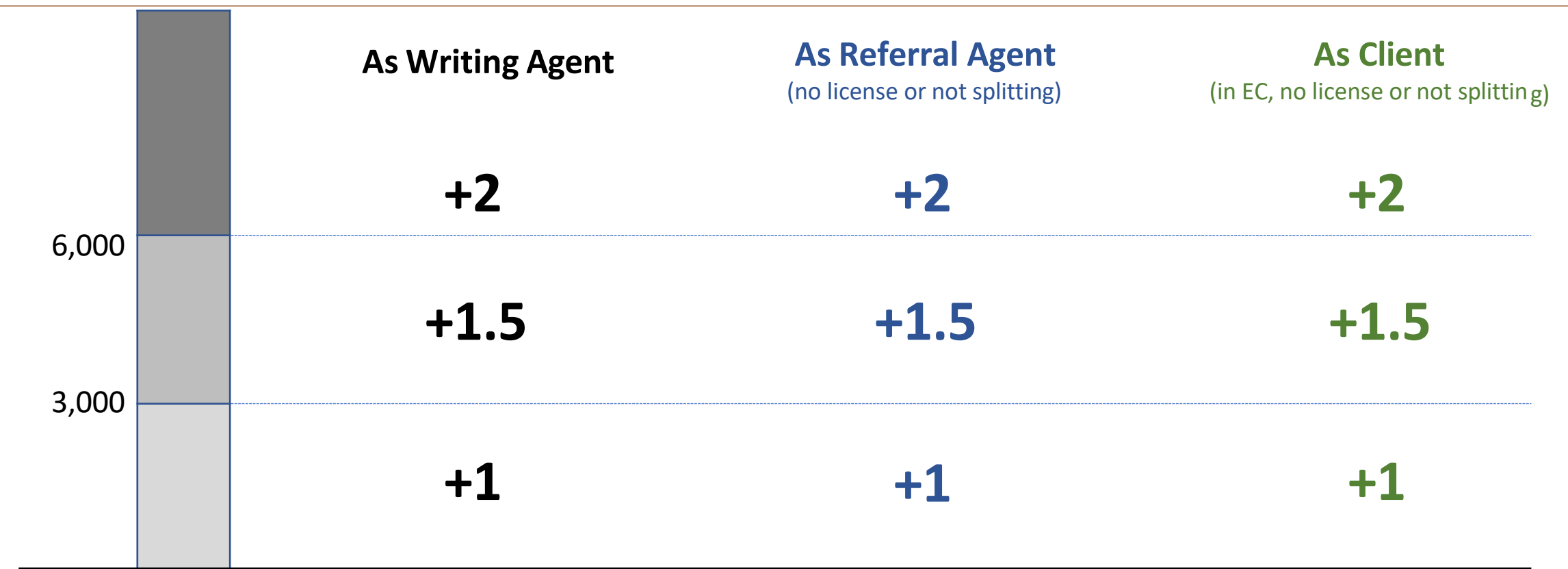
Client:

Can be either:

- a) non-member client
- b) member client without license
- c) member client with license but not participate in splitting the case



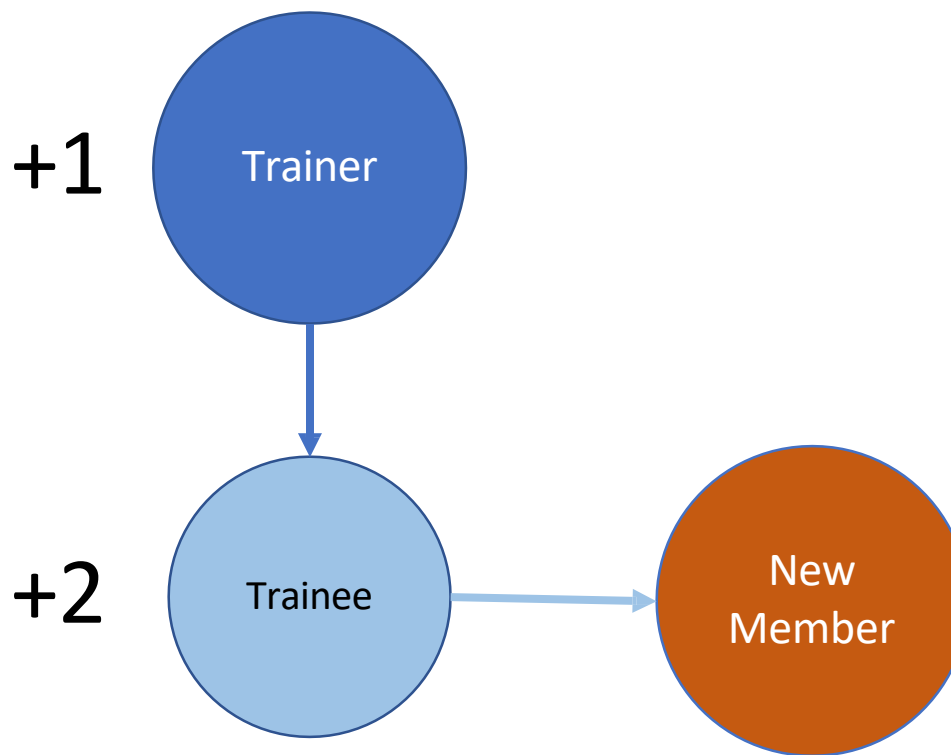
Sales – Only One Writing Agent



Sales – One Writing Agent with One Splitting Agent



Recruiting





Bonus

- New register associates (recruited after 7/31/22), joined Midwest EC-1, **+2**
- License
 - Newly licensed associates, **+2**
 - Must registered your license in mywfg.com and subscribe E&O and platform fee
- Cash flow
 - 1st \$1000 cash flow, **+2**
 - New Watch Earner (\$50K cash flow), **+3**
 - New Ring Earner 100k, **+6**
 - Ring earner 250k/500k/750k/1M, **+8**
- Promotion: **Build 3-3-30 +2, Build MD +6**, Associate **+2**, SA **+4**, MD **+6**, SMD **+8**, EMD **+10**, CEO **+15**
- Replacement: **+2** (for Class 2, 3 or 4 only). Registration of replacement: \$200/person (reminding balance can be transferred to next Midwest Elite Circle)
- Attend BPM (normal in the morning) on EC class' day: **+1 (effective from EC Class-3)**
- Follow up the link on <https://www.midwestchicagoec.com/>
You need to submit **proof contract change form/email**

2023 NYKO Registration

- <https://www.champion-team.net/copy-of-2022-nyko>
- Bonus:
 - Single registration: +2 (automatically add for you, no receipt)
 - Couple registration: +4 (automatically add for you, no receipt)
 - Book airline ticket: +1 (need to submit your receipt)
 - Book hotel for attending NYKO: +1 (need to submit your receipt)

Total bonus: 4 points for Single or 8 points for Couple

Recruiting homework submission

- Show proof of
 - New member agent ID
 - Recruiting date or MD **approval date**
- Two ways to submit proof doc:
 - New member welcome letter Email with agent ID, recruiter ID, and **date**.
 - www.mywfg.com, custom report -> downline status
- You can submit up to 5 recruits at once

Midwest Chicago EC – I Recruits Submission

Recruiting

	New Member ID	Recruiter ID	Trainer ID
1	<input type="text"/>	<input type="text"/>	<input type="text"/>
2	<input type="text"/>	<input type="text"/>	<input type="text"/>
3	<input type="text"/>	<input type="text"/>	<input type="text"/>
4	<input type="text"/>	<input type="text"/>	<input type="text"/>
5	<input type="text"/>	<input type="text"/>	<input type="text"/>

Proof Document *

Choose File No file chosen

E-mail *

ex: myname@example.com

Comments

Submit

Downline Status



CHOOSE REPORT:

Downline Status ▼

The report results are based on the current hierarchy. The 'as of date' selected is used to verify if the license(s) is(are) valid for the day selected. Since licenses constantly update or change the report is only as good as the date and time it is run. The online report only displays 250 rows/agents. To see the rest of the report, please export it to an excel spreadsheet.

ASSOCIATE ID

07BZL

TEAM

SMD Base ▼

TYPE

Active ▼

AS OF DATE

8/14/2022 

TITLE LEVEL

TA, A, SA ▼

Generate Report

Generate Full View



Run Date and Time: 8/14/2022 8:27:36 PM

Ding, Yuemei, 07BZL, As of 8/14/2022, Type - Active, Team - Base Shop, Levels - 01,10,15

First Name	Last Name	Bulletin Name	Associate ID	Title Level	Comm Level	Downline %	MD Approval Date	Country
				01	01	100	08/01/2022	US
				01	01	100	06/30/2022	US
				01	01	100	06/18/2022	US
				01	01	100	06/18/2022	US
				01	01	100	06/12/2022	US
				01	01	100	05/31/2022	US
				01	01	100	05/31/2022	US
				01	01	100	05/31/2022	US
				01	01	100	05/27/2022	US
				01	01	100	04/30/2022	US
				01	01	100	04/27/2022	US
				01	01	100	04/25/2022	US
				01	01	100	04/06/2022	US
				01	01	100	03/31/2022	US
				01	01	100	03/31/2022	US
				01	01	100	04/22/2022	US
				01	01	100	03/26/2022	US
				01	01	100	03/24/2022	US

Sales Homework

- Input agents and client's names and ID in the table. Then submit the proof pages to shown:
 - 1) when this application was submitted/advanced
 - 2) how many points
 - 3) agents name and ID page

Midwest Chicago EC – I Sales Submission

Sales

	Writing agent	Splitting agent (if any)	Referral Agent (if any)	Client (if in EC)	Case Date	Total Points
agent ID	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Name	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Proof pages for:
agents, points and
app date *

[Upload a File](#)

E-mail *

Comments

[Submit](#)

Different ways to submit proofs

- Policy history from www.mywfg.com (**high recommended**)
- Nationwide pending business
- Transamerica pending business
- For annuity business:
 - Once the companies received transferred funds, they will release the commission. You can submit the confirmation as proof. or
 - You can use the policy history
 - For one annuity rollover from more than one IRA/401k accounts, it counted as one sale.
 - For existing annuity, if the clients put more premium or rollover after one year, it could count as a new sale.
- Do **NOT** send the original application forms to us as a proof.
 - You will receive warning if clients' private information was sent to us for homework submission

Policy History



CHOOSE REPORT:

Policy History

ASSOCIATE ID

12odb

POLICY #

B503

Validate Policy

Clear Policy

ASSOCIATE ID

120DB

120DB

17AAG

COMPANY NAME

NATIONWIDE INSURANCE

DISPLAY ACTIVITY

Agent only

REPORT TYPE

Policy History

Generate Report

Generate Full View

See Instructions

When there are 2 agents, run report for each agent.



Policy History Report

Associate ID: 120DB

Associate Only

Policy History

Date



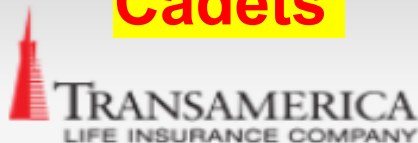
Policy Number	Company Code	Company Name	Writing Date
B5 [REDACTED]	PM0100	NATIONWIDE INSURANCE	05/29/2019
Customer Name	Product Type	Product Description	Issue Jur.
[REDACTED] Name	Equity Index Universal Life	YOURLIFE INDEXED UL NY	NY

Cycle Date	Commission ID	AgentID	Total Field Commission	Level	Split CoLead Percent	Level Percent	Advances	Recoveries
05-31-2019	[REDACTED]	120DB	\$999.58	1	50.00 %	25.0000 %	\$124.95	\$0.00
05-31-2019	[REDACTED]	120DB	\$999.58	10	50.00 %	10.0000 %	\$49.98	\$0.00
05-31-2019	[REDACTED]	120DB	\$999.58	15	50.00 %	10.0000 %	\$49.98	\$0.00
05-31-2019	[REDACTED]	120DB	\$999.58	17	50.00 %	5.0000 %	\$24.99	\$0.00
05-31-2019	[REDACTED]	120DB	\$999.58	20	50.00 %	15.0000 %	\$74.97	\$0.00
05-31-2019	[REDACTED]	120DB	\$999.58	20	50.00 %	15.0000 %	\$74.97	\$0.00
Sub-Total:							<u>\$399.84</u>	<u>\$0.00</u>
05-31-2019	[REDACTED]	120DB	\$799.66	1	50.00 %	25.0000 %	\$99.96	\$0.00
05-31-2019	[REDACTED]	120DB	\$799.66	10	50.00 %	10.0000 %	\$39.98	\$0.00
05-31-2019	[REDACTED]	120DB	\$799.66	15	50.00 %	10.0000 %	\$39.98	\$0.00
05-31-2019	[REDACTED]	120DB	\$799.66	17	50.00 %	5.0000 %	\$19.99	\$0.00
05-31-2019	[REDACTED]	120DB	\$799.66	20	50.00 %	15.0000 %	\$59.97	\$0.00
05-31-2019	[REDACTED]	120DB	\$799.66	20	50.00 %	15.0000 %	\$59.97	\$0.00
Sub-Total:							<u>\$319.85</u>	<u>\$0.00</u>

Agent

Points

Hide owner & insured names unless they are EC
Cadets



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Business Management

NOTIFICATIONS

PENDING POLICIES

INFORCE POLICIES

REPORTS

Policy Finder

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PRINT



CONTACT



UPLOAD

[General Info](#) | [Policy Requirements](#) | [Payment Info](#) | [Policy Notes](#) | [Status Info](#)

Policy#: [REDACTED]

Status: Pending

Owner: [REDACTED]

As Of: 8/25/2022 06:54 PM EDT

Insured: [REDACTED]

App Signed Date: 08/21/2022

App Submitted Date: 08/24/2022

Policy Closure Date: 11/22/2022

Financial Foundation IUL 2021 GPT

Specified Amount: \$500,000.00

Death Benefit Option: Increasing

Underwriter: UW Default

Commission Advance At

Submit: 08/25/2022

Show face amount & commission advance
date



Show Target Premium amount

Business Management

NOTIFICATIONS

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Underwriter: UW Default

Billing Information ▾

Billing Type: Bank Draft
Billing Frequency: Monthly
Billing Due Day: 1
Billing Amount: \$210.00
Monies Received: \$210.00

Future Payment Allocation ▶

Policy Guidelines ▾

Monthly No Lapse Prem: \$105.00
Target Premium: \$2,520.00
Guideline Annual Prem: \$11,867.60
Guideline Single Prem: \$52,881.70
7-Pay Premium: \$20,742.22

Show EC cadet agents' names & ID

[General Info](#) | [Policy Requirements](#) | [Payment Info](#) | [Policy Notes](#) | [Status Info](#)

Policy#: [REDACTED]

Agent Information

Name	Split %	ID	Business Phone
[REDACTED]	50%	[REDACTED]	[REDACTED]
[REDACTED]	50%	[REDACTED]	[REDACTED]

COVERAGES

BENEFICIARY INFO

AGENT INFO



FOR FINANCIAL ADVISORS

KEJIA WANG ▾
Transamerica Financial Advisors Inc (tfg)

 Favorites ▾



Topics ▾

Products ▾

Servicing ▾

Client Servicing >>

CLIENT ACCOUNTS >>

Annuities

Life Insurance

Mutual Funds (DST Vision)

COMMON TASKS

BUSINESS MANAGEMENT >>

Annuities

Life Insurance

Retirement Plans

Business Life

RESOURCES >>



Hide owner/insured names unless they are EC Cadets

Show Target premium, application date, commission processed & EC cadet agents' names

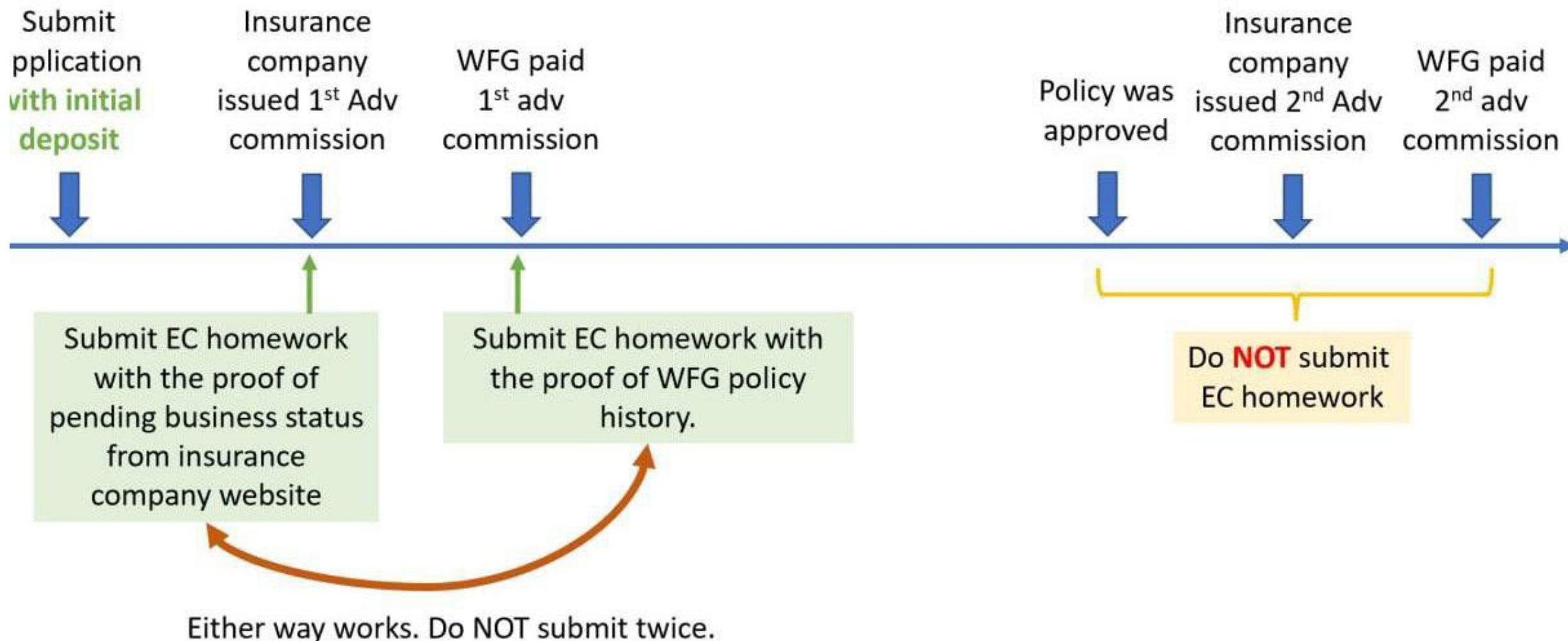


Application receipt date: 08/31/2022
1 Days elapsed

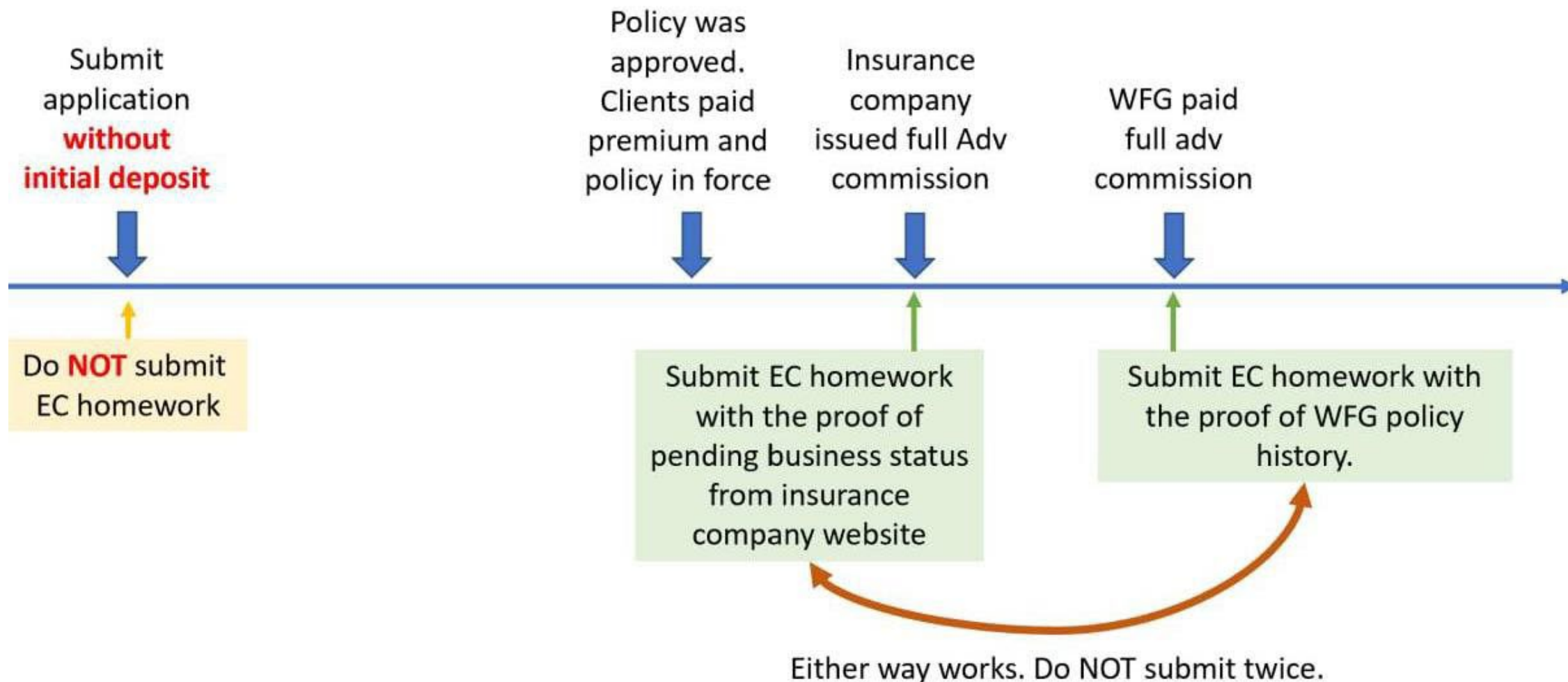
Nationwide Indexed Universal Life Accumulator II 2020

Specified amount:	\$250,000	Case status:	Pending Underwriting Requirements
Death benefit option:	Option 2	Commissions advanced:	Processed
Billing amount:	\$458	Firm name:	WORLD FIN GROUP INS ACY, LLC
Billing frequency:	Monthly	Producer:	[REDACTED]
1035 Exchange:	N		
1035 Amount:	N/A		
Estimated target premium:	\$5,411.25		
Estimated annualized premium:	\$5,496		

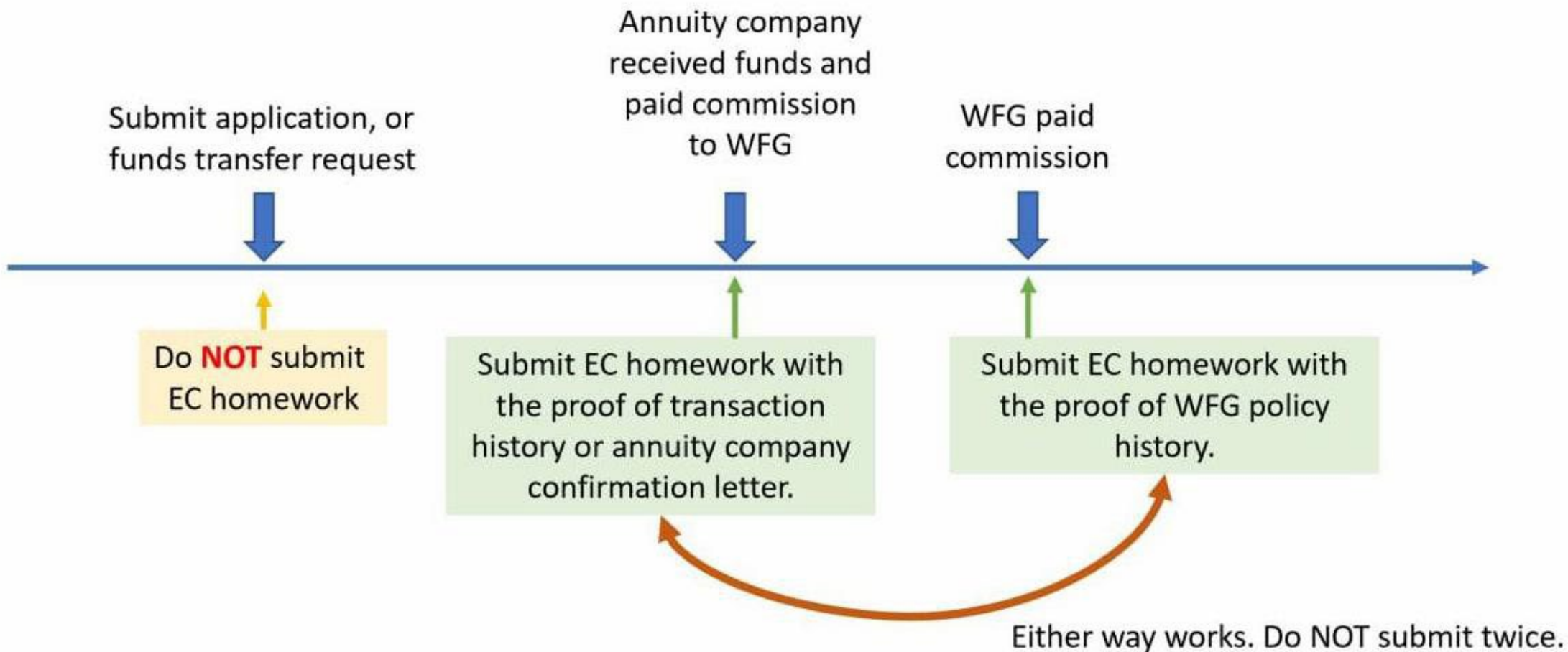
Life Insurance example: **with** initial deposit



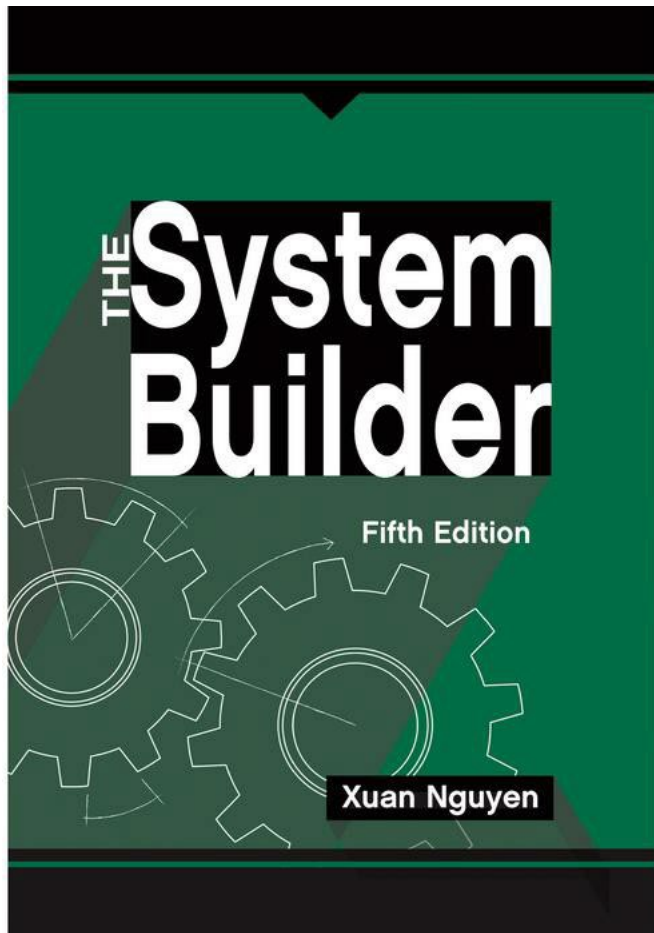
Life Insurance example: **NO** initial deposit



Annuity homework example



Book Reading



<https://shop.worldsystembuilder.com/products/the-system-builder-5th-edition>

Before Class	Due Date (same as Homework)	Earn Point
2	9/28/2022	1
3	10/19/2022	1
4	11/2/2022	1
5	12/14/2022	1



Graduation Requirement

	Graduation	Graduation with Certificate	Graduation with Honor
Min Points	+0.5	+6	+6
Personal recruit (no MAP or inactive transfer)		4	4
License and Cash Flow (during current EC)		Life, \$1,000	Life, \$1,000
Replacement			At least one
Team recruit			<p>Non-SMD: 10 team recruits in rolling 30-days or 5 team recruits for consecutive three months</p> <p>SMD: at least two BBC during EC period</p>