

Getting Started Checklist

Your Next Steps as a Licensed Agent



A Transamerica Company















Checklist / Learning Objectives	
1	Identify the main components of the system.
2	Explain the function of each component.
3	Describe the flow of information/data.
4	Identify the input and output variables.
5	Explain the role of the control system.
6	Describe the feedback loop.
7	Identify the sensors and actuators.
8	Explain the importance of calibration.
9	Describe the effects of noise and disturbance.
10	Identify the sources of error.
11	Explain the role of the operator.
12	Describe the safety features.
13	Identify the potential hazards.
14	Explain the importance of documentation.
15	Describe the maintenance requirements.
16	Identify the key performance indicators.
17	Explain the role of the data logger.
18	Describe the effects of parameter variation.
19	Identify the common faults.
20	Explain the importance of regular checks.

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The Checklist

Our platform helps agents from all backgrounds build successful financial services businesses so they can help people have better financial futures. As you get started as a licensed agent, use the following checklist to help you start on your path to success.

- ☐  Get Contracted with a Provider
- ☐  Learn About WFG Product Offerings
- ☐  Take the required New Agent Course in the Training Center
- ☐  Set Up Direct Deposit
- ☐  Sign Up for the Platform Fee and E&O Insurance
- ☐  Use the Training Center to Your Advantage
- ☐  Explore MyWFG.com
- ☐  Activate Your WFG Mail Email
- ☐  Create Your Personal Website
- ☐  Order Official WFG Merchandise
- ☐  Follow Us on Social Media and Read the WFG Weekly
- ☐  Know Your Key Contacts

Get Contracted with a Provider

World Financial Group Insurance Agency of Canada Inc. (WFGIAC) has agreements with many well-known companies in the financial services industry. To start helping people in your community and earn an income, it's essential that you become contracted with one or more of these providers. Learn more on the [Licensing Requirements & How-To page](#) on MyWFG.com.

Learn About WFG Product Offerings

The [WFG Product Guide](#) is your go-to source for the most up-to-date product and provider information, commissions schedules, and referral requirements. The guide, located on MyWFG, is regularly updated with the latest commission information for all of the products our providers offer.

If you have questions about a specific product, please contact the WFG Sales Desk at wfgsalesdesk@transamerica.com or by calling 416.225.2286.

Take the New Agent Training Course in the Training Center

The New Agent Training course provides an overview of the technology and resources available to you.

The training modules can be completed in one sitting or in multiple sessions, depending on your schedule. You can access the course through the [Training Center](#).

Set Up Direct Deposit

Get your commissions conveniently paid to you by completing the Direct Deposit Authorization Form available through the [Back Office Support System \(BOSS\)](#). From the MyWFG Menu, select Administration > BOSS Electronic Forms.

Sign Up for the Platform Fee and E&O Insurance

WFGIA offers all our licensed agents a full suite of premier technology and required Errors & Omissions insurance at a low monthly cost. The Platform Fee is \$30 per month and E&O is \$40 per month for all licensed agents regardless of field level or licence type.

These fees are required, and must be paid by setting up recurring payments via [Payment Central](#) on MyWFG. You can read more about the fees on the [Platform Fee page](#) and the [E&O page](#) on MyWFG.

Use the Training Center to Your Advantage

The WFG Training Center houses a library of helpful video courses including ones about our business model, the technology available to you, informational and inspirational messages from top field leaders, and practical tips on selling. These videos can be completed in one sitting or in multiple sessions, depending on your schedule. You can also access these training courses on your mobile device with the Litmos mobile app. To access the [Training Center](#), login to MyWFG and select the “Training Center” link from the main menu.

Explore MyWFG

MyWFG.com, our internal agent site, is the centralized hub that brings the WFG platform together. Not only is it how you access resources such as the Agent Websites and the Training Center, it's also where you obtain commissions information, business-related reports and other important notifications.

MyWFG is an essential tool as you grow your business. We recommend you familiarize yourself with the site and take a look at some of the most visited sections, such as the [Reports](#) area where you can track your and your team's production, licenses and other key business metrics, and the [Back Office Support System \(BOSS\)](#) that has many of the forms you need. Use the green plus icon at the top of the page to add your favorite MyWFG pages to the toolbox so they're never more than a couple of clicks away.

The site also has an interactive tool, Lifeline, that helps you stay on top of important aspects of operating a financial services business by providing alerts when a requirement is due. Lifeline offers three types of alerts: Red are items that need immediate attention; Yellow items are coming due soon; and Green are items that have been completed. Make sure to keep an eye on your Lifeline so you don't miss completing any requirement.

Go to www.MyWFG.com and login with your agent code to get started. If you're coming from WFG Launch, your same agent code and password will allow you to login.





Activate Your WFG Mail Email Address

Included as part of the monthly Platform Fee, all licensed WFGIAC agents receive a personal WFGmail.ca email address for their business email communications. To activate your email address, visit the [WFG Mail](#) page on MyWFG to login.

Create Your Personal Website

All WFGIAC licensed agents have the ability to create a personal website with their profile picture, contact information and personal URL.

To get started, login to MyWFG and navigate to the [Agent Website](#) page. Once there, you can request to have your website activated. It will then be sent to Compliance for review, which can take two to three business days. Once your site is approved, you can use the Dashboard to customize it. When editing fields, hover over the “i” icon to see instructions for locked fields or ones that require approval.

Order Official WFG Merchandise

The Canadian Distribution Center is the best place to obtain copies of all our pre-approved WFG brochures and presentations. It's also your go-to resource for purchasing business cards and stationery. From the MyWFG menu, select Recruiting & Selling > Marketing Resources > CAN Distribution Center to start browsing.

Follow Us on Social Media and Read the WFG Weekly

Every Tuesday, all licensed agents receive the WFG Weekly, our newsletter in which we share important announcements and news on upcoming events, contests and webinars. To ensure timely delivery, please make sure to add wfgmarketingdepartment@transamerica.com to your preferred sender's list.

We also encourage you to follow us on all our social media channels for a behind-the-scenes look at our events, as well as videos, agent recognition and more. Our social media handles are:



[World Financial Group \(WFG\)](#)



[@therealwfg](#)



[@therealwfg](#)



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Know Your Key Contacts

Whenever you have questions about WFGIAC, the best place to start is the Help & Support section of MyWFG. Select the "Help" button, located in the footer on all MyWFG webpages, to be directed to a library of Knowledge Articles that answer the field's most common questions. If you're not able to find the information you're looking for, you can submit a support ticket for further assistance.

It's also important to keep a record of these important numbers: the WFG Sales Desk, the Business Development Team (BDT), your SMD and your direct upline leader.

The Sales Desk can help you with questions about products and providers and the BDT can provide support for onboarding new agents, questions about technology, and different sales techniques, among other things.. And of course, your upline and SMD are there for guidance and mentorship throughout your time at WFGIAC.

WFG Sales Desk: 416.225.2286

Business Development Team (BDT): 877.368.4100

Your Upline SMD:

Your Direct Upline:

[Full WFG Directory](#)

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