# Is this your first Greensheet?

## Yes

**You're on the right path!**

**Let's take it step by step..**

### Step 1.
### Fill out Greensheet

Greensheets should be filled out during the **first** meeting with the client

**NOT** after speaking with Chris Norris.

Agent must complete entire greensheet questionnaire. Do Not leave any blanks!

If you do not send a Greensheet, we will not call. Be sure the agent is sending the Greensheet, **Not** the client.

### Step 2.
### Send Greensheet to the Greensheet Email

Greensheet email will be listed at the bottom of every greensheet form.

Agent will receive an automatic confirmation email once its submitted

Agent will receive requirements to do before submitting the application (i.e, getting contracted, CE course completion)

Send greensheet in at least **two** days prior to the appointment to:
greensheet@bacapitalmanagemnet.com

### Step 3. Schedule an Appointment

## No

**We knew you were an expert!**

**To refresh, let's go over it one more time...**

### Step 1.
### Revise your Greensheet

Make sure **ALL** areas are completed before submitting the greensheet. Be sure only the **agent** is completing the Greensheet

Submit Greensheet at least **two** days prior to the appointment to:
greensheet@bacapitalmanagement.com

If you do not send in a completed greensheet we will not call. Be sure only the agent is sending the Greensheet, **Not** the client.

### Step 2.
### Schedule an Appointment

Schedule an appointment with Chris Norris on the Simply Book Me website

Make sure to change the time zone to your appropriate time zone before booking.

Add your email **or** the clients email on the booking site to receive email reminder about the upcoming call

### Step 3.
### Day of the appointment

For your client to speak with Chris, you will need to book a time on our Simply Book Me website. https://burlingtonalliancecm.simplybook.me

Be in the home with client or on the call with Chris Norris at the time of the appointment.

## Step 4. After the Call

If the client wishes to continue with the process make sure you are aware of which Carrier/Product to write on your client.

If Chris needs more financial information from the client the call will be continued until information is delivered.

We recommend agent to set up another appointment so Chris can follow up once information is submitted

## Step 5. Writing the Application

Have all documents ready to write the annuity appliction on your client

Make sure you have all contracting and training requirments done (This will vary state by state)

Fill out the complete application before submitting to upline or to BAM for review

Make sure you are either in the home or on the call with your client & Chris Norris.

If Chris Norris sells the client and client would like to proceed make sure you know which carrier/product to write

## Step 4. After the Call

Depending on how the conversation goes we recommend you to either:

**1.** Meet with client to write the annuity application

**2.** Book a follow up appointment

## Step 5. Writing the Application

Have all documents ready to complete your annuity application

Once the application is completed submit the application to your upline or to BAM for review.

# DONE!! Another Annuity for the Books! On to the Next…