

## New Agent On-boarding process:

*Welcome to Global Atlantic!  
As a partner in your success,  
we've outlined the following  
onboarding process to make  
sure your first months are  
smooth and productive.*

Throughout the next few months, we'll schedule regular sessions with you to:

- Get to know your business and build a roadmap to success
- Review Global Atlantic and our processes
- Train you on our products
- Review marketing tools available to you
- Introduce technology we use to calculate rates, submit business and claims, and track sales
- Educate you on training – personalized onsite classes, pre-recorded sessions, phone coaching and monthly webinars – and help you schedule the sessions you need

*You'll be supported by a full team that'll work with you every step of the way to help ensure your success.*

We're here to help you be successful.  
Contact us anytime.

**(866) 449-3722 | [globalatlantic.com/preneed](https://globalatlantic.com/preneed) | [preneedsales.support@gafg.com](mailto:preneedsales.support@gafg.com)**

## Here's what you can expect in your first months with us:

### Day 1

#### Your dedicated eSales Consultant will call you to:

- Ask you about your business, experience, goals, and more
- Introduce Global Atlantic processes and products
- Review our agent portal where you'll find everything you'll need to do business

After our first call, we'll send you a packet of information, including:

- General overview welcome packet
- Family packs
- Product sheets
- Training links
- Webinar schedule
- Marketing materials to get you started

### Day 2-5

#### Now that you've reviewed some material, we'll follow up with you to:

- Continue product training and answer your questions
- Provide log-in credentials and training on how to calculate rates, submit business and track sales
- Review your short-term goals and build a plan to help achieve them
- Reserve your spot for upcoming webinars and training
- Discuss your marketing plan and our lead generation resources

### Week 2

#### By now, you've hit the streets and started presenting to families! We'll check in with you to:

- Review how your meetings are going
- Make sure your experience with our systems is going smoothly
- Schedule time with our dedicated training team

*In your first months — and throughout your career — our team at Global Atlantic will be there to ensure your success with the help and support of our best-in-class field sales team, trainers and eSales Consultants. Even when you're no longer considered a new agent, we'll be here to support you and your funeral home, and keep your preneed business thriving with our Preneed 360° approach.*



### Week 3

You're probably hitting your stride! But we're still here to make sure you have everything you need to succeed. In this call, you and your dedicated eSales Consultant will:

- Review your sales to date or discuss how to get your first sale
- Evaluate your lead generation tactics and provide additional tools or training as needed
- Schedule upcoming training sessions

### Week 4

As your first month comes to a close, we'll help you establish good habits to carry with you as your business grows. Your eSales Consultant will call you to:

- Assess your sales to date
- Examine InSight reporting and metrics to manage your business
- Reserve your spot in the next New Agent Webinar
- Review lead generation tactics and the tools we make available to you to help build your leads pipeline

### Week 5-8

During the next month and beyond, we'll follow a consistent recipe for success that can be integrated into your normal routine. In this discussion and in following months, our team will call you to:

- Review your sales on a weekly basis
- Schedule sales skill training with your Global Atlantic trainer
- Check InSight reporting to ensure your business is healthy
- Review incentive contests as applicable
- Share best practices with your fellow new agents in monthly webinar series

## Testimonial:

### Tyler Walls, Pennsylvania

"I'm extremely satisfied with the structured onboarding experience with Global Atlantic. The approach taken by the Business Development Director and eSales Consultant was very helpful for a new agent.

As I am new to the industry, the owner of my funeral home had me also get appointed with two other carriers, which supplied no guidance on how to sell their products or fill out their forms.

I was most surprised by the transparency and flexibility of the Global Atlantic team, which made the transition into this new role encouraging to someone new to the industry."

Global Atlantic Financial Group (Global Atlantic) is the marketing name for Global Atlantic Financial Group Limited and its subsidiaries, including Forethought Life Insurance Company. Each subsidiary is responsible for its own financial and contractual obligations.