<u>Agent Checklist:</u>

1. **Complete Initial presentation, either solo or with Market Director**

2. **Complete Follow Up Presentation**
    a. Include Quick Quote snapshot
        i. Quick Quote Capstone Plus
            1. Click link above
            2. Click “File”
            3. Click “Make a copy”
            4. Bookmark the copy to your browser
            5. Copy this formula below and paste it into the “**<u>GROSS PAY Row”</u>** This formula needs to be pasted into the box with **<u>$2,000</u>** gross income showing. =ARRAY_CONSTRAIN(ARRAYFORMULA(IFS(E5="","",E5="Monthly",E6/12,E5="Weekly",E6/52,E5="Bi-Weekly",E6/26,E5="Semi-monthly",E6/24)), 1, 1)
            6. After creating the quick quote for your prospect, take a screenshot and add the image to the Follow -Up Deck in the back of tax saver.

3. RFC and Census Completion

a. Coordinate with the client on how to gather the correct Census Template information
    i. Preferably, the client's payroll company or payroll representative will complete this for you

b. Complete RFC Form with Client, or have client complete RFC form solo and make sure it's submitted to Capstone.
    i. Using the link above:
        1. Type client's first name, last name, and email address and click "Review Document"
        2. Once completed, have client submit the form at the top right corner of the page. This will send it directly to capstone.
        3. Schedule Follow Up meeting for 2 weeks out

4. Register Prospect with Capstone

a. Register Prospect with Capstone
    i. This will allow Capstone to see that the RFC form submitted for your client is tied to you as the agent
    ii. For the Box Labeled "Capstone Market Director" you will type "Andrew Cardi" in that box.

b. Register your prospect in Tax Saver back office
    i. Go to taxsaver247.com
    ii. Login
    iii. Click "Register" and fill out the basic form

5. After Completed Proforma is Received

a. Meet with Client to breakdown the completed Proforma based on their company's data.
b. Pull up the MSA (Master Services Agreement) and explain it to the client
c. Send it over to them to complete the signatures and then submit the MSA to Capstone.
d. If multiple EIN's, multiple RFC's and MSA's must be completed for each EIN

6. After MSA is Completed

a. Coordinate with the client 3 times that work to set up a kick-off call 72+ hours AFTER the MSA has been submitted to set up a Kick-off call with Capital Group and Amaze Health
b. Create email thread with yourself, the client, and Andrew Cardi (andrew@nlstoday.com)

At this point, the TPA and Amaze will be handling the rest of the process with your client. Just make sure you are a part of the remainder of the calls