

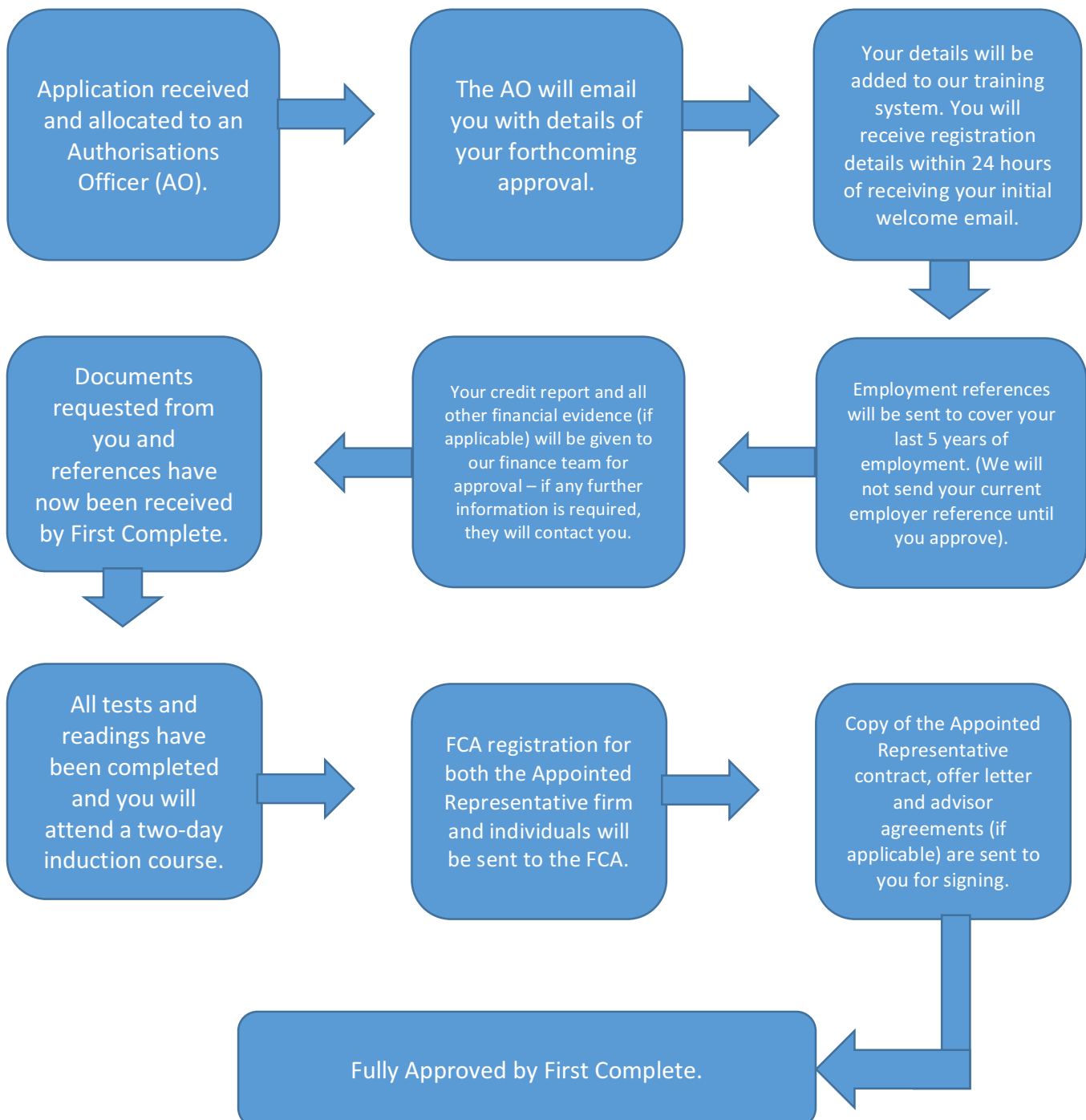
Using this document as an aid, collate as many numbers as possible of family/friends/work colleagues etc. that you think may benefit from a protection product, noting their occupation and location to assist in the organisation of your appointments.

Things to consider that may be of assistance:

- Are they self-employed?
- Do they receive company sick pay?
- Do they have children?
- Have they just bought a new home?
- Do they play sports?
- Do they know someone who has been financially impacted by an illness?

Full Name	Telephone Number	Occupation	Location

What will happen during my approval process?



Individual Due Diligence – Documents required

Proof of residency

We require evidence of residency at your current address. This evidence should be dated within three months of your application being submitted to First Complete. This can be a utility bill, bank statement, credit card statement or any other official document.

Personal Identification

We require a copy of ID for all applications. This can be a photo copy as we will ask you to take the original to your induction course prior to your approval. ID should be in the form of either a driving licence (both card and paper counterparts) or a passport.

Credit Report

A credit report with a score is required for each person. This document will be used to assess the financial fitness & propriety of each individual (as required by the FCA) you can gain access to these reports via Experian, Equifax, Noddle or Check My File.

Please Note: should there be any adverse financial information noted on your credit report or disclosed on your application, we will require full information regarding it. This may also lead to the need for further financial evidence which could include bank statements, mortgage statements and credit arrangement evidence being requested.

Industry Qualification Certificates (MORTGAGE ADVISORS ONLY)

If you apply to conduct mortgage advice you will need to evidence your industry qualifications (CeMap, CFI & CF6 etc.) these can be a photo copy as we will require you to take the originals to your induction course for certification.



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The ideal consultant

- Introduction
- Committed
- Presentable
- Consistent
- Quality and quantity
- Customer care
- Product knowledge
- Experience handling pressure
- Excellent communication skills
- Objection handling skills
- Good listener
- Motivated to earn money
- Open to challenges
- Desire to do the job
- Bold and honest

Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday
AM	AM	AM	AM	AM	AM	AM
PM	PM	PM	PM	PM	PM	PM