Activation Checklist

Congratulations, you are officially an agent and we look forward to you joining the Company! This training will serve as the guide to ensuring your success as an Agent. During this week will setup and go over the following:

- ☐ Copy of ID, SS Card, Finger Print Card
- ☐ Certificate of NR Tax Test
- ☐ Complete Agent Application & Agreement
- ☐ Yelp, Manta, LinkedIn, Craigslist
- ☐ Gmail, Google Voice, YouTube
- ☐ Twitter, Facebook, Instagram

- ☐ 7-Minute Timed Return
- ☐ Tax Summary Sheet Explanation
- ☐ Income Identifier
- ☐ Phone Script & Role Playing
- ☐ nuCare payments via tax return
- ☐ Double Your Refund

- ☐ ID Picture
- ☐ Tax Advertisement Video

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