

# Elite Circle Class Homework Submission Guide

August 14<sup>th</sup>, 2021



Chinese Elite Circle  
Orientation

# HW Submission General Rule

- Electronic Submission:
  - [www.elitecircleclass.com](http://www.elitecircleclass.com)
- Submission cutoff day: Last Wednesday Midnight (EST) before ECC.
- 7-days rule:
  - Right after recruit/sale, within 7-days you should submit homework. If you miss 7-day period, you won't get credits.
- Spouse:
  - Couple are counted as one person, unless registered as separate cadets.



# Homework Proof

- Recruit
- Sale
- Attending BPM – attend all BPMs +1
- Promotion
- Ring and Cash flow
- Book Reading
- Callout
- Score – Strike 減分
- Bonus



# Recruiting-Proof

- We accept two types of proofing:

#1: The **direct recruiter** will receive an email for new personal recruit

wfghost@transamerica.com <wfghost@transan

Congratulations on a new personal recruit!

*New Associate Info*

Associate ID: 48ABC  
First Name: New  
Last Name: Member  
Phone Number: (732) 111-2222  
Cell Number: (732) 111-2222  
Email Address: new.member@gmail.com  
Recruiter ID: 11ABC  
Recruiter Name: Your Name Here  
Recruiter's SMD ID: 00ABC  
Recruiter's SMD Name: Your SMD  
Tracking Number: 658348

#2: Under "MY TEAM", search your new member and find "Associate Details"

Name:	New Recruit (48ABC)
Level:	TA
DOB:	1 Jan
Start Date:	5/15/2016
Home Phone:	(555) 567 - 8889
Business Phone:	(718) 886-5097
Mobile Phone:	(555) 567 - 8889
Personal Email:	new.recruit@gmail.com
Business Email:	
Home Address:	1 Main Street MANHASSET HILLS, NY 11040 - US
Business Address:	37-20 PRINCE ST. SUITE 2A FLUSHING, NY 11354 - US
Spouse:	
Recruiter:	Your Name
Upline SMD:	Your SMD
Upline CEO:	Your CEO



# Sales - Proof

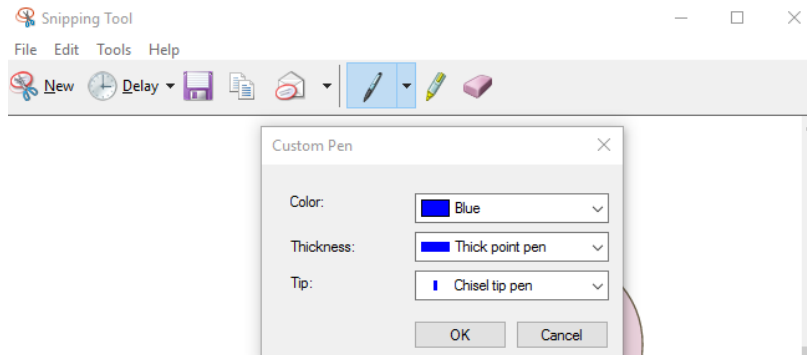
- Please mask client's sensitive information like: DOB, SSN, address, and bank account number. EC team is not responsible for any ID stolen. We will delete the files after verify points.
- Life Insurance Sales Proof
  - Application page 1 (mask client's SSN and DOB)
  - Client signature page
  - Agent signature page (if not in the same page of client signature page)
  - EFT/Check image (mask client's bank account number)

\*For Life insurance without initial deposit, you can NOT submit homework at application. When the application was approved and client is willing to pay premium and accept the policy, you can submit this sale as homework.
- Rollover or MF
  - Application page 1 (mask client's SSN and DOB)
  - Client signature page
  - Agent signature page (if not in the same page of client signature page)
  - Statement



# How to Submit Sales Homework

- Writing > Splitting > Referral > Client
- How to submit pages and mask information:
  - Windows “Snipping Tool” to screen capture application pages
  - Use “Snipping Tool” -> Custom Pen -> Thick Point Pen to mask



## Chinese EC Homework 1-Sales Submission

Writing Agent Name \*    
First Name Last Name

Writing Agent ID \*  Split Agent ID

Referral Agent ID  Client (If Agent) ID

Application Page \*  No file chosen

Client Signature Page \*  No file chosen

Producer Certificate Page \*  No file chosen

Check Image/Bank Info/Statement \*  No file chosen

Estimated Total Points \*

E-mail \*



# Office BPM Attendance

- Please follow the link on [www.elitecircleclass.com](http://www.elitecircleclass.com) to submit BPM attendance.
- You are required to submit sign in on the same day of office BPM held.

## Chinese ECC - BPM Sign In

\* Required

Your Name \*

Your answer \_\_\_\_\_

Agent ID \*

Your answer \_\_\_\_\_

I attend BPM at \*

- 131 Continental Dr., Suite 305, Newark DE 19713
- 10320 Little Patuxent Pkwy, Suite 200, Columbia, MD 21044
- 5072 Dorsey Hall Dr, Suite 202, Ellicott City MD 21042
- 9801 Washingtonian Blvd., Gaithersburg MD 20878
- 600 Airport Blvd., Suite 300, Morrisville NC 27560
- 682 N. Brookside Rd, Allentown PA 18106
- 101 Lindenwood Drive Suite 225, Malvern PA 19380
- 150 N Radnor Chester Road Ste F200, Radnor PA 19087



# Promotion - Proof

## #1 Contract change letter

**Date:** December 15, 2015 at 5:26:16 AM EST  
**To:** <[REDACTED]>  
**Cc:** <[REDACTED]>  
**Subject:** Authorization for Contract Change Complete for [REDACTED]  
**Tracking Number:** 566666

Dear [REDACTED],  
Please be advised that the above referenced agent reassignment to level 10 has been processed. Your new level can take up to 24 hours to reflect on [MyWFG.com](http://MyWFG.com), but has been updated in the Home Office systems.

Please do NOT reply to this email. Should you have any questions regarding this matter, please contact our WFG Host via email [wfghost@transamerica.com](mailto:wfghost@transamerica.com) or by phone [\(770\) 246-9889](tel:(770)246-9889).

Should you have any questions regarding this matter, please contact WFG HOST via email [WFGHOST@Transamerica.com](mailto:WFGHOST@Transamerica.com) or by phone [\(770\) 246-9889](tel:(770)246-9889).

Thank you,

WFG Coding Department  
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## #2 Contract Change Form



### AUTHORIZATION FOR CONTRACT CHANGE

This form is only used when requesting a promotion.

The requested change on this form is for the following associate:

Name: [REDACTED] Code #: [REDACTED] Date: 3/3/2016 12:18:36 PM

**Level Change**

Level changes are for Training Associates (Level 1) thru Senior Marketing Directors (Level 20) only.

The new Contract Level for the WFG associate is 10. Generally, the WFG associate must meet all requirements for any promotion. See the WFG Compensation System and Promotion Guidelines, located in the Field Manual on MyWFG, for promotion requirements.

The first active upline SMD must approve all contract changes for Associate thru SMD. Additionally, the first upline CEO MD (Level 70) must approve all contract changes to SMD. A signed MD or SMD Agreement must be submitted with the MD or SMD promotion requests.

Approved by: [REDACTED]  
First Active Upline SMD Signature Code # Date First Active Upline CEO MD Code # Date

Approved by: [REDACTED]  
Associate's Signature Code # Date

By signing this document, I accept this Contract Change and understand that my E&O rate could be impacted by this change.

**Builder's Exchange**

The first active upline SMD can choose to take a Builder's Exchange leg from a newly promoted downline SMD. The Builder's Exchange is a one-time option only to be requested concurrently with the SMD promotion.

First Active Upline SMD, [REDACTED], Code # [REDACTED] is requesting the following Builder's Exchange leg(s):

**Option A**  
One (1) SMD, MD, or Senior Associate (Level 15) from the newly promoted SMD's downline.

Assoc. Name: [REDACTED] Code #: [REDACTED]



# Cash Flow - Proof

Don't mask your name and code while submit homework. Otherwise we cannot verify proof.



WFG Reports

## Total Cash Flow

Personal Monthly Report for: [Redacted] between February 2015 and January 2016

Month Year	Personal Cash Flow
2/2015	[Redacted]
3/2015	[Redacted]
4/2015	[Redacted]
5/2015	[Redacted]
6/2015	[Redacted]
7/2015	[Redacted]
8/2015	[Redacted]
9/2015	[Redacted]
10/2015	[Redacted]
11/2015	[Redacted]
12/2015	[Redacted]
1/2016	[Redacted]
<b>Totals:</b>	<b>\$105,458.54</b>



# Book Reading - Proof

- Submit reading summary through the link on [www.elitecircleclass.com](http://www.elitecircleclass.com)
- Summary limit to 150~300 words



# Bonus - Proof

- BU: SMD submit proof
- License: WFG – License and Appointment Report
- Replacement: Register online
- BBC: WFG – Points & Recruits report



# Everything is @

- <http://www.elitecircleclass.com>
- [info@elitecircleclass.com](mailto:info@elitecircleclass.com)

