

# Course Enrollment

## Prerequisites

1. 5 years financial services industry experience
2. \$100,000+ Gross Dealer Concession production
3. Life, health, variable annuity and Series 6 licenses
4. At least 50 existing clients between 55-75 years old

## Curriculum

1. 2-Day Academy in Denver, Colorado (15 classroom hours)
2. 1½ hour online virtual classes held monthly for 3 months following the Academy
3. Weekly blog posts
4. Weekly field exercises

## Commitments

1. Bring names and mailing addresses of 5 target market clients to Symetra Income Academy
2. Agree to schedule 5 client appointments per week following the academy
3. Submit one current 'live' client case to Symetra two weeks prior to the Academy for case design and analysis during classroom training (all data will be kept confidential and clients will not be contacted)
4. Participate in monthly virtual classes and weekly blog posts
5. Provide your Symetra Wholesaler weekly progress reports
6. When appropriate for your clients, utilize Symetra products when implementing the Customized Retirement Income Model<sup>SM</sup> (CRI).

## Symetra's Commitment to You

1. Provide 'state of the art' retirement income training
2. Provide take-home hard copy of the Academy Training Manual
3. Provide follow-up training
4. Provide individual case design for your 1st three cases
5. Quick responses to any questions via personal phone calls or weekly blog posts
6. Provide 3-D Marketing Manual focusing on:
  - a. Client retention
  - b. Cross-selling the CRI Model<sup>SM</sup> to existing clients
  - c. New client building referral system
7. Concierge Wholesaler Support
8. Provide articles and white papers

## Course Fees

1. Your airfare
2. Daily accommodations at Denver Airport Marriott at Gateway Park for \$129/night
3. \$1,000 Tuition (waived if marketing/business plan is followed)

To register, visit  
[www.symetra.com/incomeacademy](http://www.symetra.com/incomeacademy)

**I have read and agree to the above Course Enrollment.**

Name \_\_\_\_\_  
 Address \_\_\_\_\_  
 City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_  
 Phone \_\_\_\_\_  
 Email \_\_\_\_\_  
 Signature \_\_\_\_\_

## Partnership Commitment

*To be completed by your Symetra Income Academy partner*

Name \_\_\_\_\_  
 Phone \_\_\_\_\_  
 Email \_\_\_\_\_  
 Signature \_\_\_\_\_

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 Symetra Customized Retirement Income Model<sup>SM</sup> is a registered service mark of Symetra Life Insurance Company.