



# How To Get Your Genistar Licence



**Dear (First Name),**

We hope the start of your Genistar journey has been fantastic and you have been in contact with your upline and EVP for training. We want to take you through the steps to become licensed. There are two different roles in the Genistar sales field: Introducer and Representative.

**INTRODUCER:**

Introducers operate on a commission-only basis from client referrals. Everyone who has their IBA approved begins their Genistar journey as an Introducer.

### **REPRESENTATIVE:**

A Representative's role is to provide financial education to their clients and help them by developing their own personalised Financial Game Plan. Representatives can then offer their client(s) products that meet their financial requirements.

Representatives operate on a commission-only basis and earn commission through product sales and referrals.

### **BECOME A LICENSED REPRESENTATIVE**

#### **ASSESSMENTS AND COMPETENCIES:**

A Representative must have their Life Insurance Competency in order to meet clients on their own and conduct any part of the Genistar sales process for life insurance. To become a licensed Representative, the following assessments must be completed:

- Scoop Assessment
- Carryback Assessment
- Representative Exam
- Vitality Exam

On Genistar.Online and the Info Hub, you can find a range of audiobooks, reading materials and video resources to support you through each of the examinations and assessments, allowing you to study using your preferred learning style!

Your upline or EVP will be there to support you when preparing for the scoop and carryback assessments, guiding you towards improvement every step of the way. You will begin by observing an experienced Representative conduct a couple of client meetings, showing you the best way forward.

#### **REPRESENTATIVE CHECKLIST:**

Use our Representative checklist to help keep you on track with what to do next and when to do it, so you can build your business in the most effective way:

Download the [Representative Checklist here](#).

### **TAKE ACTION NOW**

#### **BANK DETAILS:**

In order for Genistar to pay you your commission, we'll need you to upload your bank statement information via your Genistar.Online account. If you need any assistance with this, please contact your upline or EVP.

If you want to move speedily in your Genistar business, the three A's will help you:

- **Accountability:** Hold yourself accountable to keep on track with your goals.

- **Action:** You can take the first step without seeing the whole staircase – take things step by step to suit you.
- **Achievement:** Share your goals with your upline or EVP so they can check in with you on your progress, this will also allow them to celebrate your achievements with you!

We look forward to celebrating you getting your Genistar license!,

Yours in success,

**Genistar Field Support Centre Team**

**020 3372 5085** | [Genistar.Online](#)

Genistar Limited is authorised and regulated by the Financial Conduct Authority.

Registered Office: Victoria House, Harestone Valley Road, Caterham, CR3 6HY

A limited company incorporated in England and Wales. Registered number 06315485  
F0542-14/09/16

Victoria House, Harestone Valley Road CR3 6HY Caterham GB