

GENISTAR
Financial Freedom For All

Welcome to the Genistar Journey

Associate Roadmap

This is the first step on your Genistar Journey.

At this level, you can start to lay the foundation for your business and begin earning while you are learning.

This guide will help you on your journey to be successful with Genistar.

What we will explore:

Objectives

Responsibilities

Action Steps for Success

Soft Skills for Progression

Message from our CEO

JEFF LESTZ



Tips from Jeff:

- ➢ Be coachable
- ➢ Follow the system
- ➢ Get your promotions quickly



Objectives

Your primary focus as an Associate is to become familiar with the Genistar system and identify your first potential clients and business partners. This will help you begin laying the foundation for your future business success.

Responsibilities

Your key responsibilities as an Associate is to “Travel Double” with your trainer, which is a vital step towards getting real-life experience and developing the skills needed to help people secure a better financial future.

Achieve this by introducing your “warm market” to your supervisor or field trainer.



To “Travel Double” means to shadow your trainer.
Your “Warm market” is the people who you know, and they know you.

Action Steps For
SUCCESS

Focusing on these key areas will guide you in your initial efforts and help you develop the essential skills and knowledge needed to thrive in this business.

Contact your upline to help you master the steps below.

Click each step for further information, then tick the box when that step is completed. Feel free to skip around, as they don't have to be completed in this order.

- [ ] Understand Genistar: our story and our values, mission and vision.
- [ ] Set your goals with your supervisor.
- [ ] Attend Genistar's Orientation Session.
- [ ] Complete your Financial Plan with your supervisor.
- [ ] Familiarise yourself with the basic scripts.
- [ ] Observe at least two field training appointments with your trainer.
- [ ] Complete your training so that you can get licensed.

Soft Skills for Transitioning to Representative:

- [ ] Develop a growth mindset, be coachable and build a strong work ethic.
- [ ] Embrace new learning experiences and systems.
- [ ] Take initiative in personal development and become self motivated.
- [ ] Manage your time so you can prioritise learning and training activities.

UNDERSTAND GENISTAR:

Our Story, Our Values, Mission & Vision

Our Story



- [ ] Watch the video to learn about Genistar’s history and philosophy.

Our Values

INTEGRITY | TEAMWORK | DIVERSITY & INCLUSIVITY

Our core values are the basis of everything we do at Genistar. They guide our interactions with our clients and teammates.

- [ ] Have a look at **our website** to learn more about our core values.

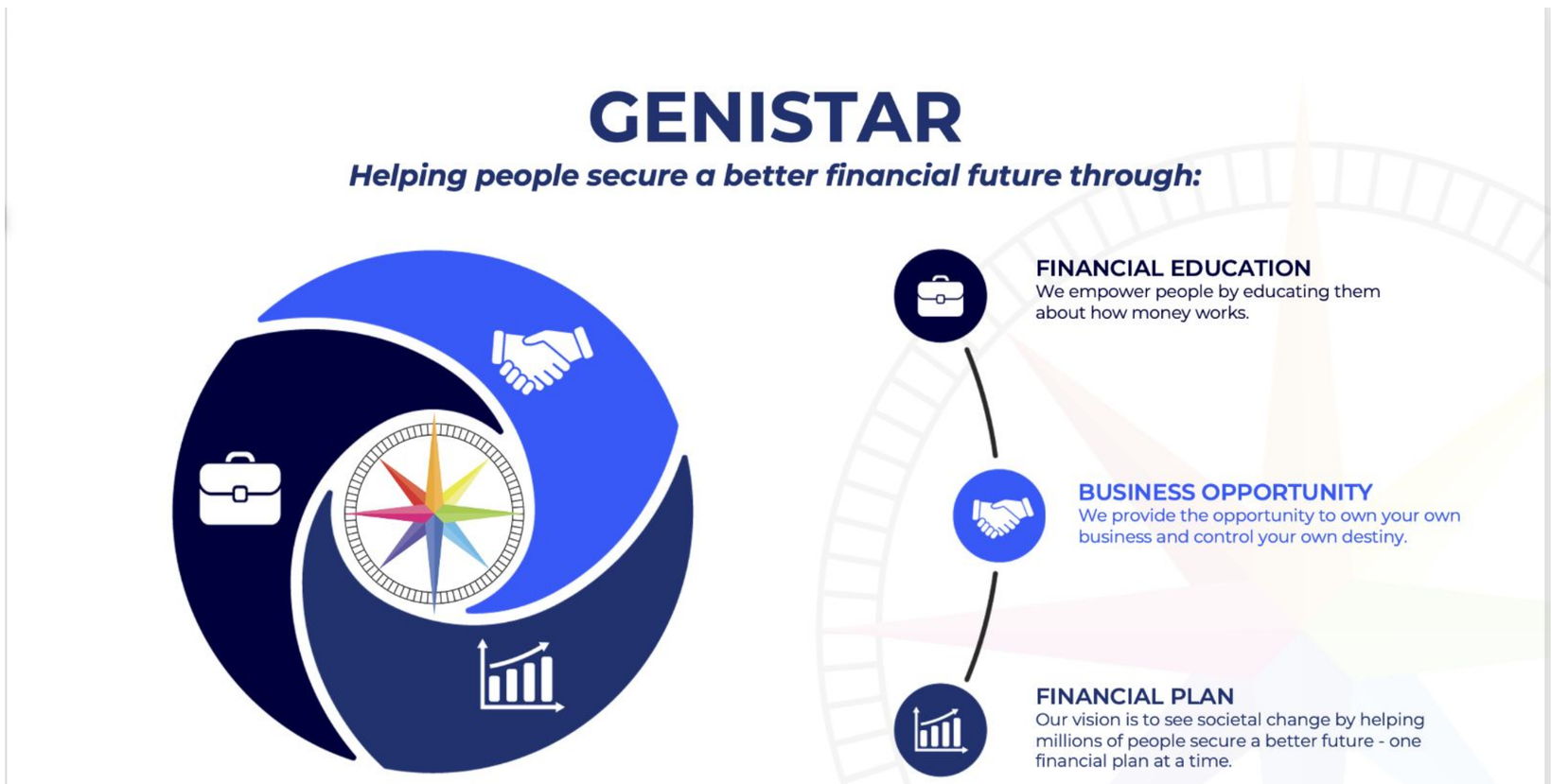
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UNDERSTAND GENISTAR:

Our Story, Our Values, Mission & Vision

Our Mission & Vision

- [ ] Familiarise yourself with our mission and vision.



Genistar Values

- [ ] Watch the video by CEO, Jeff Lestz.



- [ ] UNDERSTANDING GENISTAR
Action steps complete

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Set Your GOALS

Setting goals can bring you clarity and keep you motivated. Staying focused on your goals can help you manage priorities, track progress, and even boost your confidence by marking your achievements along the way.

- [ ] Read this article on SMART goal setting:
  Goal Setting in 8 Easy Steps

- [ ] Set your Clear Concise Mental Picture (CCMP) and go through the workbook with your supervisor.



- [ ] Have your upline help you use the Goal Calculator on Genistar.online

- [ ] Watch this video from Clara Debrie about **'What is your CCMP?'**

SET YOUR GOALS
Action steps complete

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Attend the
ORIENTATION SESSION

The Orientation Session is a very important part of your early training. It is imperative if you want to get started on the right track.

Highlights of what you'll learn at the Orientation Session:

- An overview of the company
- Help in creating your contact list
- How field training works and how to get licensed
- How the Genistar referral system works
- How to book appointments
- Which products and services we offer our clients
- How you get paid and how much you can earn in Genistar
- How your business can become your retirement fund
- How we have fun in Genistar
- How to get your next promotion

We generally hold online group orientation sessions weekly at 8 pm.

Join Zoom Meeting

REGISTER NOW

Meeting ID: 845 3065 5901
Passcode: 737044

Please note: To get the most out of your Orientation Session, please turn your camera on, take notes and participate.

Although Orientation Sessions are normally held at the above date and time, please check with your upline to verify.

☐ I will be attending the Orientation Meeting this week.

☐

ATTEND THE ORIENTATION
Action steps complete

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Build Your
CONTACT LIST

Write down everybody you know (don’t leave anyone out; give them a chance to learn about the Genistar opportunity and the financial game plan).
Look through your mobile phone for names.

☐ Watch **this** video to help you fill out your contact list.

RECRUITMENT CONTACT LIST

M	K	H	E	AGE	NAME	MOBILE	HOW DO YOU KNOW THEM?	OCCUPATION/ LOCATION	I	S	T	E	A	M

M - Married H - Home Owner K - Kids E- Employed/Working 25 - Aged 25-55
I - Influencial S - Sales T - Teacher E - Enthusiastic A - Ambitious M - Needs More Money

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Build Your
CONTACT LIST

CLIENT CONTACT LIST

M	K	H	E	AGE	NAME	MOBILE	HOW DO YOU KNOW THEM?	OCCUPATION /LOCATION	I	S	T	E	A	M

M - Married H - Home Owner K - Kids E- Employed/Working 25 - Aged 25-55
I - Influencial S - Sales T - Teacher E - Enthusiastic A - Ambitious M - Needs More Money

☐ I have completed the Contact Lists.

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Your
FINANCIAL PLAN

GET YOUR OWN FINANCIAL FREEDOM PLAN STARTED.

- [ ] Schedule your own personal financial review appointment with your partner and your trainer. As well as being a valuable tool for you and your family, this will help you understand the client experience.

Read the article: [What is Genistar's Financial Plan and why you need one]

FINANCIAL GAME PLAN

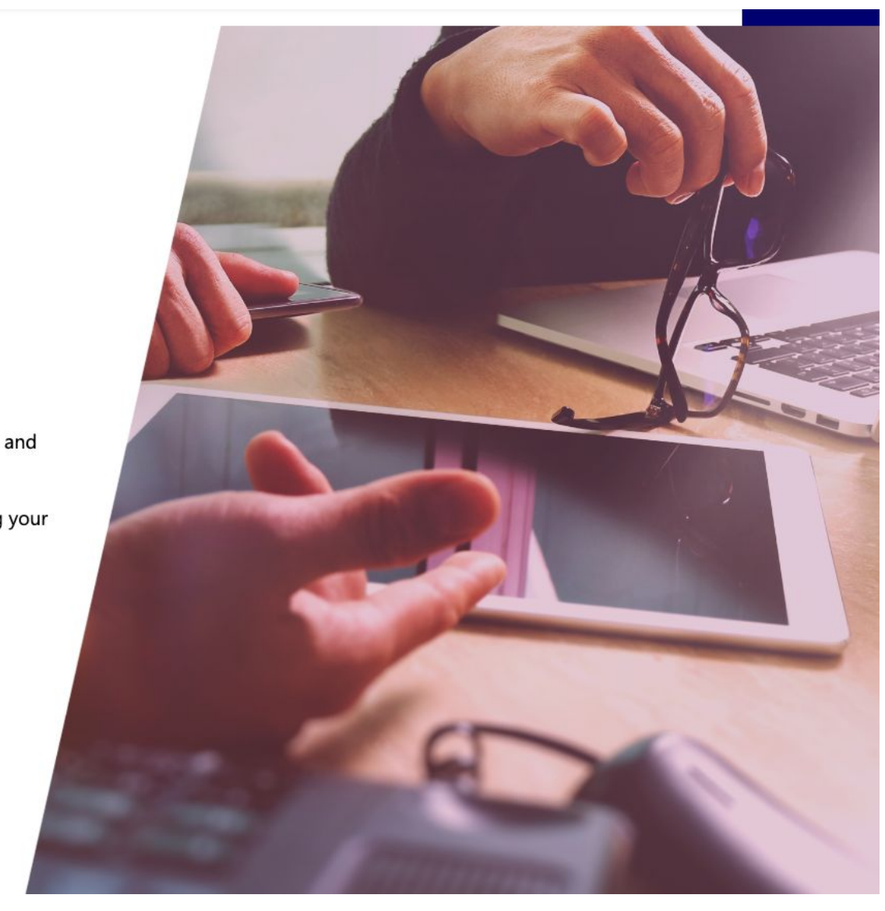
John Doe
January 2025

This is where your journey to financial freedom begins.

Your Financial Game Plan is tailored around your financial circumstances and is designed to highlight issues and educate you on potential solutions.

Your Genistar representative, Jeff Lestz, will be able to assist you with any questions you may have regarding your financial education.

PRINT MY FGP



- [ ] YOUR FINANCIAL PLAN
Action steps complete

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Learn the SCRIPTS

☐ Practice Presentation Script

You can practice this script with friends and family before you are licensed but you MAY NOT complete the Fact Find.

Have Your Presentation Ready

Remember: You are calling a friend. Keep it simple, ask for their help, set the appointment.

Hi _____ this is _____(your name)

As you probably know, I recently became involved with a financial education company, Genistar, and I need to ask for your help.

I need some practice giving my presentation to people who will give me some honest feedback and score me. Would you do that for me? WFA

Great, if I book an online meeting/pop around on _____ evening, what time would be best for you, 7pm or 9pm? WFA

And _____(partner) will be there too?

Thanks for your help, see you on _____at _____pm.

Possible Objections You Can Overcome:

What is it for?
It's really just for me to prove to my trainer that I am competent, and I know you would give me honest feedback if there are areas I need to improve on.

Do I have to give you any personal information?
All you have to do is listen and give me feedback on a form that I will bring with me.

Does it cost anything?
It doesn't cost anything at all except your time and it would really help me out.

Partner won't be there.
Oh, I really need both of you to be there. As most of our clients are couples it's important that I practice in our most common scenario. When would be a good time when both of you could help me? WFA.

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Learn the SCRIPTS

☐ Recruiting Script for Business Overview Video

1. Recruit says to friend:

Hi I have just gone into Business with _____ and he/she is here with me right now. I'm passing you over. I think you and he/she will get on.

2. 'Recruit and I were chatting the other day and I asked her who she knew that good with people and liked helping people, and your name came up in conversation. I dont know if you are open to anything new right now, however, I am looking for a few people who would like to teach a financial education programme online from home, and part time typically working 1 or 2 evenings a week and earning £1k - £2k per month.'

3. 'If you have an interest, all I would like to do at this point is send you a Youtube video. Its only 10 minutes long and if you like the contents, we can chat in more detail at a later date.'

4. YES - 'I'll send the video on WhatsApp, can you it watch by lunchtime tomorrow? I can call you just for 5 minutes between 12-2pm tomorrow. If you like what you have heard, we will set up a follow up meeting to get all your questions answered by my Executive Vice President.'

5. Send video + Trustpilot link + a message saying 'Nice chatting to you, take a look. It's only 10 mins. long. Speak tomorrow between 12-2pm. Regards ____ (your name).'

TEXT TEMPLATE

'Hi (Person's Name), I hope you're doing well. I recently met with a business leader called (Upline's Name) who is also a Financial Coach.

He shared some financial concepts with us which helped us make some informed decisions that I found very helpful and prudent.

Is it ok if I get him to give you a call ? Thanks'

RECRUITING TEXT TEMPLATE

Hi ..... (Person's Name),

..... has asked me to text you. I have recently shown him/her some ideas on how to make and save some money and he/she has asked me to show you the very same thing and to get in touch with you. Please take my call in the next few days and I will give you the details.

Regards (your name)

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The opinion and magic question
SCRIPTS

Memorise these scripts to develop genuine responses that resonate with people. Learn to address concerns thoughtfully and turn skeptics into valued connections through honest dialogue.

Each section of the workbook offers real-world exercises. Practice authentic conversations, refine your approach, and build confidence in your ability to connect meaningfully with others.

Master the Magic Question

Discover how asking insightful questions can lead to meaningful conversations. Learn to listen actively and create opportunities for genuine engagement.

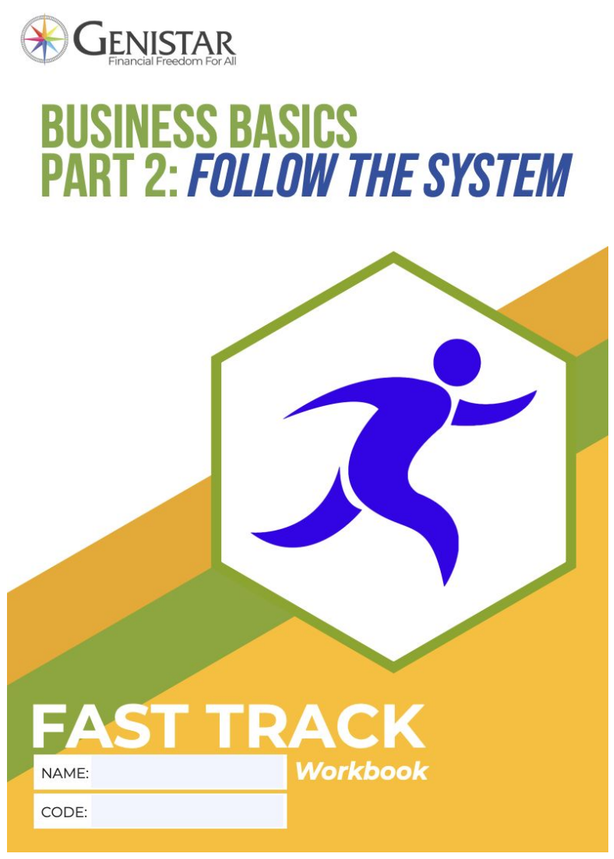
Understanding Human Motivations

Explore the psychology behind why people engage with new opportunities, focusing on authentic needs, aspirations, natural curiosity, and the value of personal connections.

Fostering Genuine Interest

Develop the skill of creating authentic intrigue. Learn how to present information in a way that naturally piques curiosity and encourages further conversation.

Master the art of clear, honest communication. Learn how to present your opportunity with integrity, ensuring that your audience has all the information they need to make informed decisions.



BUSINESS BASICS WORKBOOK

Part 2: Follow the system

This workbook will help you with advanced recruiting and sales techniques, including follow-up strategies, rapport-building methods, scripted conversations, effective presentations, and practice exercises.

Get started

Workbook Part 2 completed

LEARN THE SCRIPTS
Action steps complete

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Field Training
TRAINING IN YOUR WARM MARKET

☐ Influence / Knowledge

You have the Influence, and we have the Knowledge.

Your warm market is generally made up of close friends and family who are willing to meet with you as part of your training.

As you’re not yet licensed when you start, and you have limited knowledge and credibility in the area of financial education, your trainer will go with you to your warm market.

Since we’re licensed, we’ll help them now, and you’ll benefit from the training, plus you will feel more comfortable in your lukewarm (referral) market, and you will EARN as YOU LEARN. If your Trainer writes business for the client you will be paid 12.5% of the annual premium.

Besides, having an experienced trainer along with you when you talk to your friends and family, might help them feel more comfortable discussing their finances with you.

We can give you credibility with your loved ones and talk to them for you about referrals.

When they give us referrals, we will split those with you to get you started. If they are interested in joining Genistar, they become part of your Genistar team. Don’t worry, we will train your first 3 recruits for you because you are still learning. Then when you qualify to train others, you’ll be the one taking those recruits out on field training appointments, helping families and helping them to EARN as they LEARN.

Keep your appointments no matter what! Reconfirm two days ahead. Be a person of integrity. Remember, your reputation precedes you! You’re building your story and your success story helps recruit people!

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Field Training

TRAINING IN YOUR WARM MARKET

☐ Training Triangle

Use the Training Triangle script to explode your business.

You (Trainer) and your recruit (Trainee) are on a Zoom call together. Your recruit calls (Referral):

Trainer:
Hello, (Referral) my name is (your name), and I have (Trainee) here with me.

(Trainee and Referral will exchange greetings. When questions begin, turn phone back over to Trainer.)

Trainer:
So (Referral), the reason I called is that (Trainee) recently got involved in business with us, and she/he is in the process of obtaining his/her certification.

In order to finalise their requirements for the position, she/he needs to be in the field with a field trainer like myself, and witness at least two of our financial education presentations, (Trainee) said that out of all the people he/she knew, she/he felt most comfortable asking you for help.

WFA (wait for answer)

We will be together on Zoom, _____ evening... So which time would be better for you, 7pm or 9pm on (day of the week)? (Book it.) Thanks, and your partner will be there too, right?

WFA (wait for answer)

I look forward to meeting you and (partner) on _____ (day) at _____ (time).

Training Triangle videos:

- ☐ Steve Jenkins presenting: https://youtu.be/9las6w23KuY

If you get any objections, simply say:

Don't worry (Referral), We are only asking you to listen and give your honest reaction. I promise we are not going to try to sell you anything. Even if you wanted to buy something we would have to organise another appointment.... So, which time would be better for you, 7 or 9 on _____(day).

OK, I look forward to meeting you then. Thanks for helping out

☐

TRAINING
Action steps complete

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LICENSING CHECKLIST

Start a course

- [ ] **Field training**
- [ ] **Life Insurance Competency**
- [ ] **Representative Course**
- [ ] **Vitality Training**
- [ ] **Assessments**

LICENSING
Action steps complete

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SOFT SKILLS

Develop a positive, growth mindset, be coachable and build.



How the Mind Works

A positive mindset in business fuels resilience and creativity, turning challenges into opportunities for growth. Watch this video by our SNSD Steve Jenkins on how your mind works.

Watch Now

I have watched this video.

Your Upline is Your Lifeline

Being coachable is essential, as it allows you to learn from others' experiences and avoid common pitfalls. Watch this video by SVP Alan Palmer.

Watch Now

I have watched this video.



POSITIVE MINDSET
Action steps complete

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SOFT SKILLS

Embrace new learning experiences and systems.

Go for No

Embracing setbacks as learning opportunities allows you to grow, adapt, and come back stronger each time. Watch this video to learn the different ways you can refine your approach towards success.

Watch Now

I have watched this video.



NEW EXPERIENCES
Action steps complete

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SOFT SKILLS

Take initiative in personal development and become self motivated.

No Limits

Personal development is key to unlocking your potential, as it fuels continuous growth and builds skills that support long-term success. Watch this video by Primerica SVP Clara Debrie about having No Limits.

Watch Now

I have watched this video.



PERSONAL DEVELOPMENT
Action steps complete

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SOFT SKILLS

Manage your time so you can prioritise learning activities and attend training and acquire a strong work ethic.

Scheduling a Week

Following a schedule throughout the week brings structure and focus, helping you prioritise tasks and manage time effectively. Consistent scheduling builds momentum, reduces stress, and ensures steady progress toward your goals.

Watch Now



TIME MANAGEMENT
Action steps complete

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