 DONDON DIMAILIG

 702-354-8290

 _____

2025

**BE THE ARCHITECT
OF YOUR FUTURE**

Throughout this Agenda book, scan QR Codes using the camera on your mobile device to access content and links.



 @MyWSB
facebook.com/groups/wsbcommunity

 @wsb_official

 youtube.com/c/wsbworldsystembuilder

PROGRAM YOURSELF FOR SUCCESS

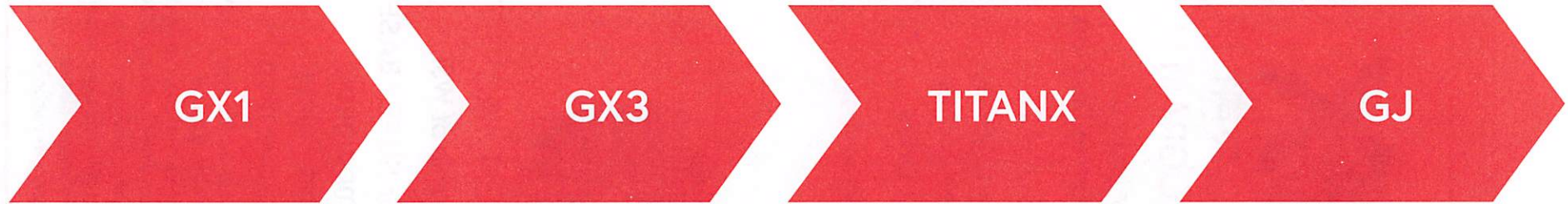
1. Have a big vision, a dream that is worth living for.
2. Have a mission that motivates your purpose in life.
3. Submit and commit to a winning system.
Follow the path of success.
4. Write down a plan of action with:
 - ❖ Clear goals
 - ❖ Definite time frames
 - ❖ Things you will need to sacrifice to become successful
5. Identify your strengths and your weaknesses.
Do you know why you win or why you lose?
6. Discipline yourself physically and emotionally.
Always lead by example. Always be positive.
7. Surround yourself with like-minded people and distance yourself from negative people who bring you down.
8. Have a high level of tolerance. Treat people well.

"I don't see the future. I create the future."

– COACH XUAN NGUYEN

THE SYSTEM FLOW

"Do it right"



"Do it with pride"

"PEOPLE GATHERING"

Join–Own–Share
Fast Start with Trainer
to learn:

- ❖ Prospecting
- ❖ Contacting
- ❖ Presentation

Qualify for GX1

"THE BIG PUSH"

Duplicate Fast Start
to become GX3

Qualify for MD

"THE BASESHOP BUILDING MACHINE"

Build a Baseshop with
many GX Trainers

Qualify for SMD

"THE TEAM BUILDING MACHINE"

Build a Team

- ❖ 30 at the meeting
- ❖ 30 Recruits/month
- ❖ 100K Base/Super Base
per month

Build an GX Trainer Factory

Qualify for WSB/
Green Jacket

THE GX BUILDING PROGRAM

You can't build a big team without big events, and you can't build something big without a big vision. Everything big in numbers, size, and scale comes from borrowing and sharing a big vision. As a leader, my team can only be as big as what I can see. As a WSB System Builder, the community builds my team's vision, actions, and results.

– VICTOR SALVADOR

WSB PROGRAMS



TRAINER ACADEMY

Empowering campaigners and building new Trainers

6 names to the 30by30 Counter
or
3 names to the 30by30 Counter
Enrolled in Pre-licensing

*For any 1 month.
Must show on WSB 30by30 Counter.*



PROGRAM

GX PROGRAM

A clear focus of building Marketing Directors

PERSONAL
3 Campaigners
15K Net Points
in 30 Days

For any 1 month.



TITANX 1000

Coaching program of discipline and focus

PERSONAL
3 Campaigners
15K Net Points

BASESHOP
10 Campaigners
30K Net Points

*For any 1 month.
Must be SMD+ to qualify.
Must show on MyWFG.com.*

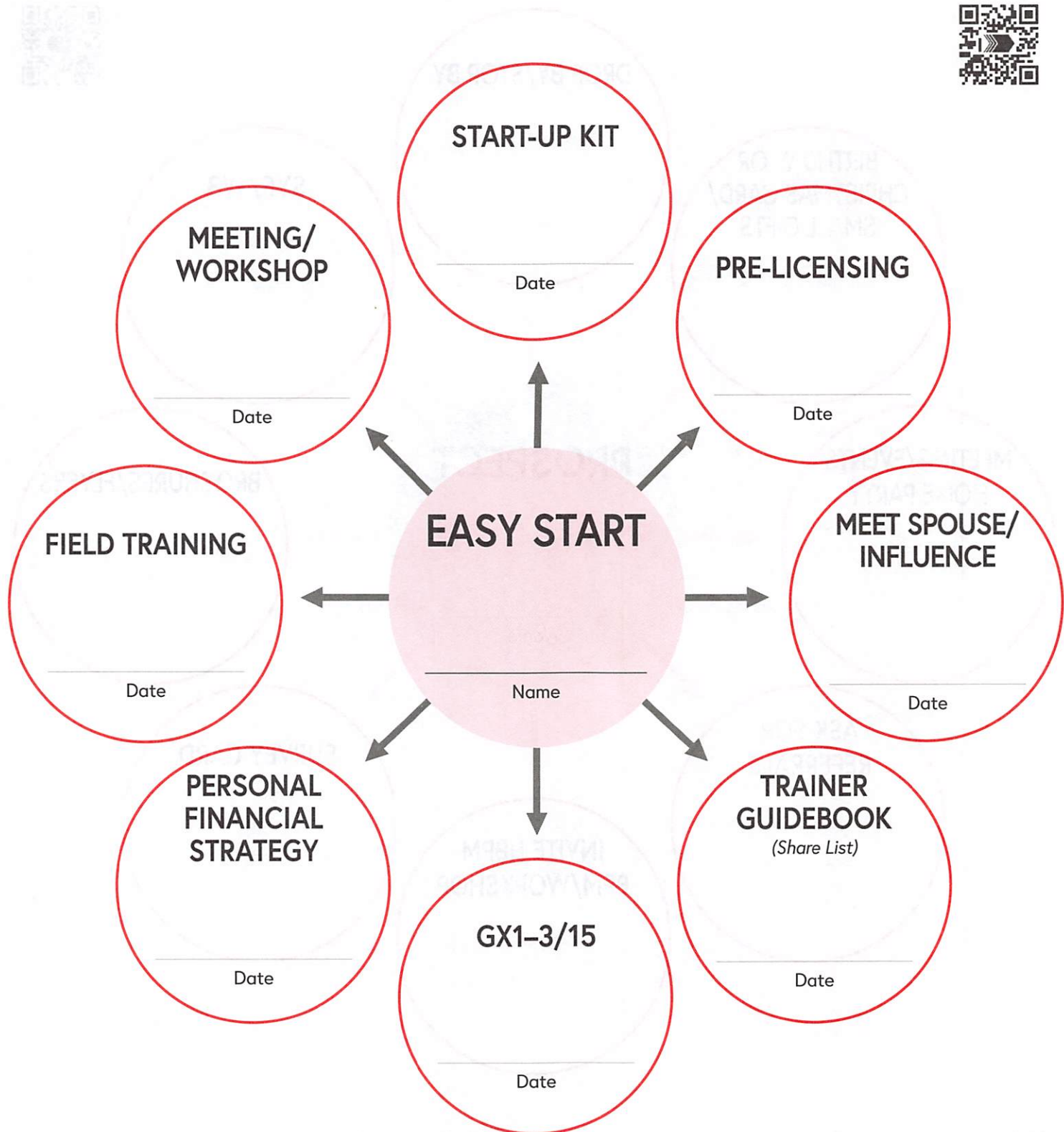


WSB GREEN JACKET

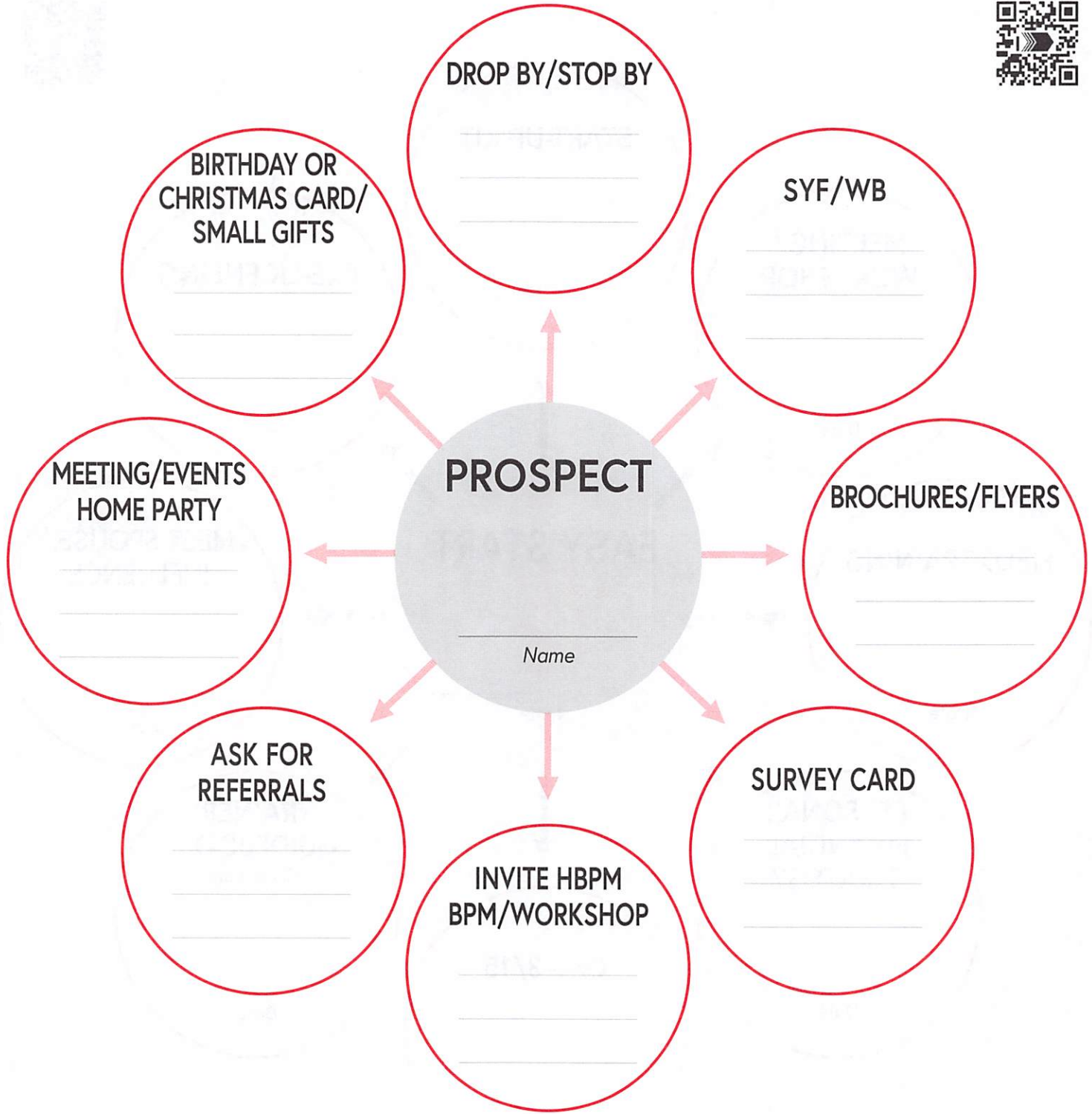
The leadership of WSB

SMD BASE or SUPER BASE
100 Campaigners
300K Net Points
in 3 consecutive months

*Qualifier must have met all qualifications for SMD by end of qualifying period.
180K points and 100 campaigners must show on MyWFG.com.
GJ Blotter must be completed (showing 300K submitted points during qualifying period).
No more than 1/2 of points and campaigners from any 1 LEG on the submitted blotter.
Must requalify every year.*



***Sit down with your Trainer to review your goals and take action!
Declare what you will contribute to the campaign!***



Notes: _____

Estate Preservation: _____
 RSSA/CIFP: _____
 College/University Prep: _____
 Convention: _____
 Super Trip: _____



WORLD SYSTEM BUILDER EVENTS & SUPER TRIPS

TRAVEL THE WORLD LIVE THE DREAM

CREATING ONCE-IN-A-LIFETIME MEMORIES,
EXPERIENCING CULTURE & MAKING HISTORY
WITH OVER 43,000 FAMILIES TO THE
CARIBBEAN - VIETNAM - CHINA - JAMAICA - FRANCE
THAILAND - HAWAII - PRAGUE - SPAIN - JAPAN - ITALY
SOUTH KOREA - ISRAEL - NYC - EGYPT - TAIWAN - HONG KONG
MEXICO - PORTUGAL - TURKEY & BACK TO SOUTH KOREA IN 2025!

WHO WILL YOU BRING TO THE NEXT SUPER TRIP?

2011	CHINA	_____	_____	_____
2012	VIETNAM & CAMBODIA	_____	_____	_____
2013	FRANCE	_____	_____	_____
2014	THAILAND & SINGAPORE	_____	_____	_____
2015	SPAIN	_____	_____	_____
2016	JAPAN & SOUTH KOREA	_____	_____	_____
2017	ITALY & GREECE	_____	_____	_____
2018	VIETNAM	_____	_____	_____
2019	ISRAEL & GREECE	_____	_____	_____
2022	SPAIN & PORTUGAL	_____	_____	_____
2023	THAILAND	_____	_____	_____
2024	TURKEY	_____	_____	_____
2025	SOUTH KOREA	_____	_____	_____

NATIONAL WORKSHOP/MEETING SCHEDULE

MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY
TITANX1000 9:00 AM PT	WSB FREEDOM CALL 9:00 AM PT			
WORKSHOP 11:00 AM PT	WORKSHOP 11:00 AM PT	WORKSHOP 11:00 AM PT	WORKSHOP 11:00 AM PT	WORKSHOP 11:00 AM PT
WORKSHOP 5:00 PM PT	SAVING YOUR FUTURE 5:00 PM PT	WSB TEAM MEETING 8:30 PM ET <i>(East Region)</i>	PRODUCT HIGHLIGHTS 5:00 PM PT	CAMPAIGN INTRO 5:00 PM PT
WORKSHOP 7:00 PM PT	WORKSHOP 7:00 PM PT	WSB TEAM MEETING 7:30 PM PT <i>(West Region)</i>	WORKSHOP 7:00 PM PT	WORKSHOP 7:00 PM PT

Subject to
change.
Latest
available
here



BUILDER'S DAILY FOCUS

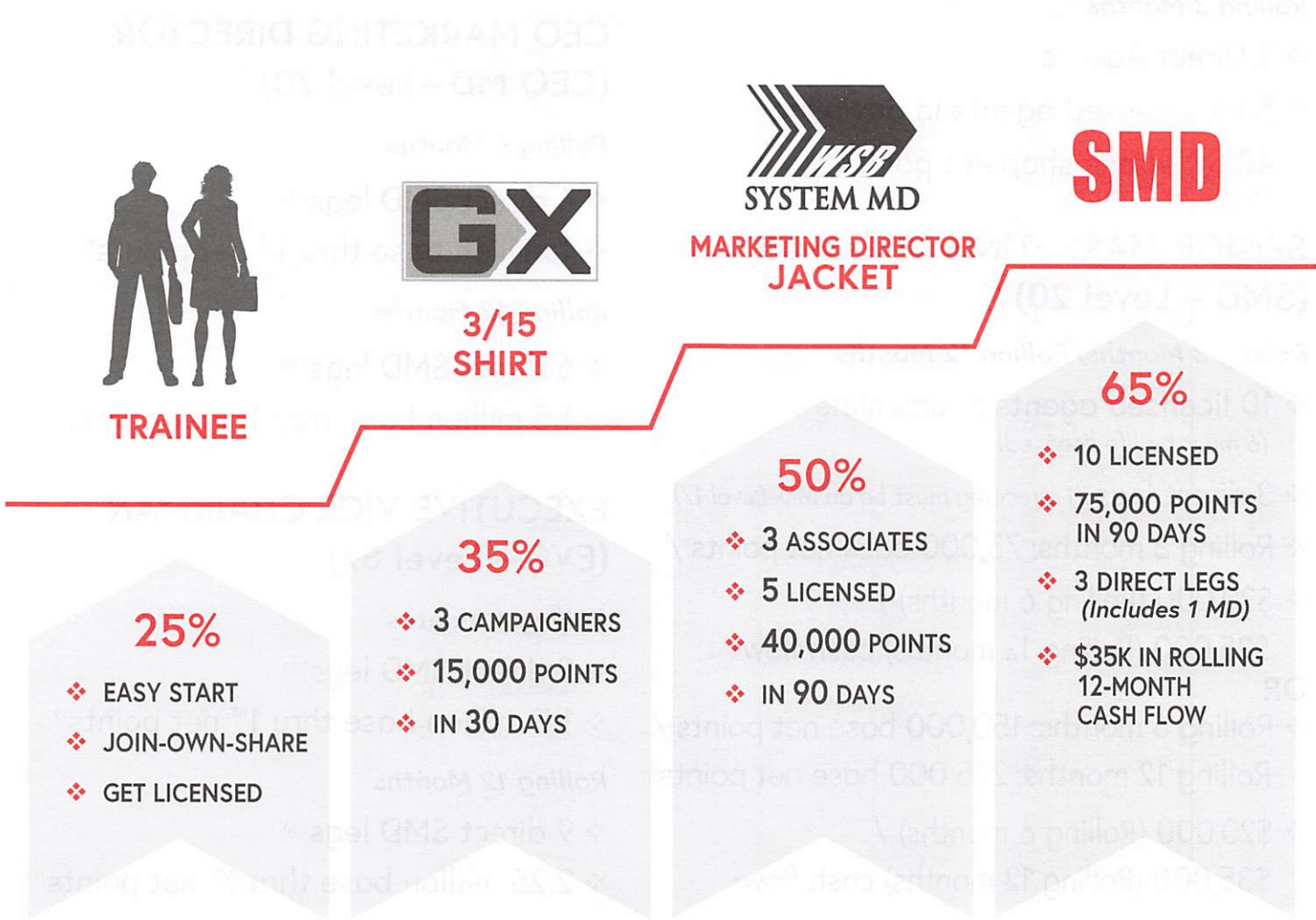
What is your bubble chart assignment today?

EASY START GX1 - 3/15	TRAINERS GX3 - 9/45	ACTIVITIES FOR OTHER MEMBERS
<ul style="list-style-type: none"> ❖ Start-Up Kit ❖ Pre-Licensing ❖ Meet Spouse/Influence ❖ Trainer Guidebook ❖ GX1-3/15 ❖ PFS ❖ Field Training ❖ Meeting Workshop ❖ "Counter" Share List <p><i>Are you deeper today?</i></p>	<ul style="list-style-type: none"> ❖ Good Trainers ❖ New Trainers ❖ Run for MD ❖ Run for SMD ❖ Build GX ❖ Personal Recruits ❖ Make money ❖ Match up Trainers <p><i>Build their Base to build your Base!</i></p>	<ul style="list-style-type: none"> ❖ In Licensing ❖ In Workshop ❖ In Meeting ❖ In Convention ❖ In Super Trip ❖ In and Out ❖ Maintain and Retain <p><i>Keep them engaged! Keep them involved!</i></p>

By 12pm, you should know what's happening tonight!

THE FAST START SYSTEM

STANDARD MD PROMOTION GUIDELINE	FAST START MD GUIDELINE: GX3
<ul style="list-style-type: none"> ❖ 3 Direct Agents ❖ 5 Life-Licensed Agents in your organization ❖ 40,000 Base Shop Net Points 	<ul style="list-style-type: none"> ❖ Qualify 3 times: 3/15 in 30 days ❖ In Rolling 5 Months <div style="display: flex; justify-content: space-around; align-items: center;"> <div style="border: 1px solid black; padding: 5px; text-align: center;">GX1 ➔</div> <div style="border: 1px solid black; padding: 5px; text-align: center;">GX2 ➔</div> <div style="border: 1px solid black; padding: 5px; text-align: center;">GX3 ➔</div> </div>



Simple. Clear. Fast. Doable.

ADVANCEMENT GUIDELINES¹

AGENT (Level 10)²

❖ 3 - 3 - 30

(Recruit 3 new agents and observe your field trainer complete 3 non-securities sales calls in 30 days.)

OR

❖ 20,000 net points in a rolling 3 months

MARKETING DIRECTOR (MD – Level 17)²

Rolling 3 Months

- ❖ 3 Direct Agents
- ❖ 5 life-licensed agents in downline
- ❖ 40,000 base shop net points

SENIOR MARKETING DIRECTOR (SMD – Level 20)^{3,4,5}

Rolling 3 Months/Rolling 12 Months

- ❖ 10 licensed agents in downline
(6 must be life licensed)
- ❖ 3 direct legs *(1 direct leg must be an MD–Level 17)*
- ❖ Rolling 3 months: 75,000 base net points⁶/
- ❖ \$20,000 (Rolling 6 months) /
\$35,000 (Rolling 12 months) cash flow⁶

OR

- ❖ Rolling 6 months: 150,000 base net points⁶/
Rolling 12 months: 225,000 base net points⁶
- ❖ \$20,000 (Rolling 6 months) /
\$35,000 (Rolling 12 months) cash flow⁶

EXECUTIVE MARKETING DIRECTOR (EMD – Level 65)^{7,8,9}

Rolling 6 Months

- ❖ 3 direct SMD legs^{5,10}
- ❖ 500,000 base thru 1st net points¹¹

Rolling 12 Months

- ❖ 3 direct SMD legs^{5,10}
- ❖ 750,000 base thru 1st net points¹¹

CEO MARKETING DIRECTOR (CEO MD – Level 70)^{7,8,9}

Rolling 6 Months

- ❖ 6 direct SMD legs^{5,10}
- ❖ 1 million base thru 1st net points¹¹

Rolling 12 Months

- ❖ 6 direct SMD legs^{5,10}
- ❖ 1.5 million base thru 1st net points¹¹

EXECUTIVE VICE CHAIRMAN (EVC – Level 87)^{7,8,9}

Rolling 6 Months

- ❖ 9 direct SMD legs^{5,10}
- ❖ 1.5 million base thru 1st net points¹²

Rolling 12 Months

- ❖ 9 direct SMD legs^{5,10}
- ❖ 2.25 million base thru 1st net points¹²

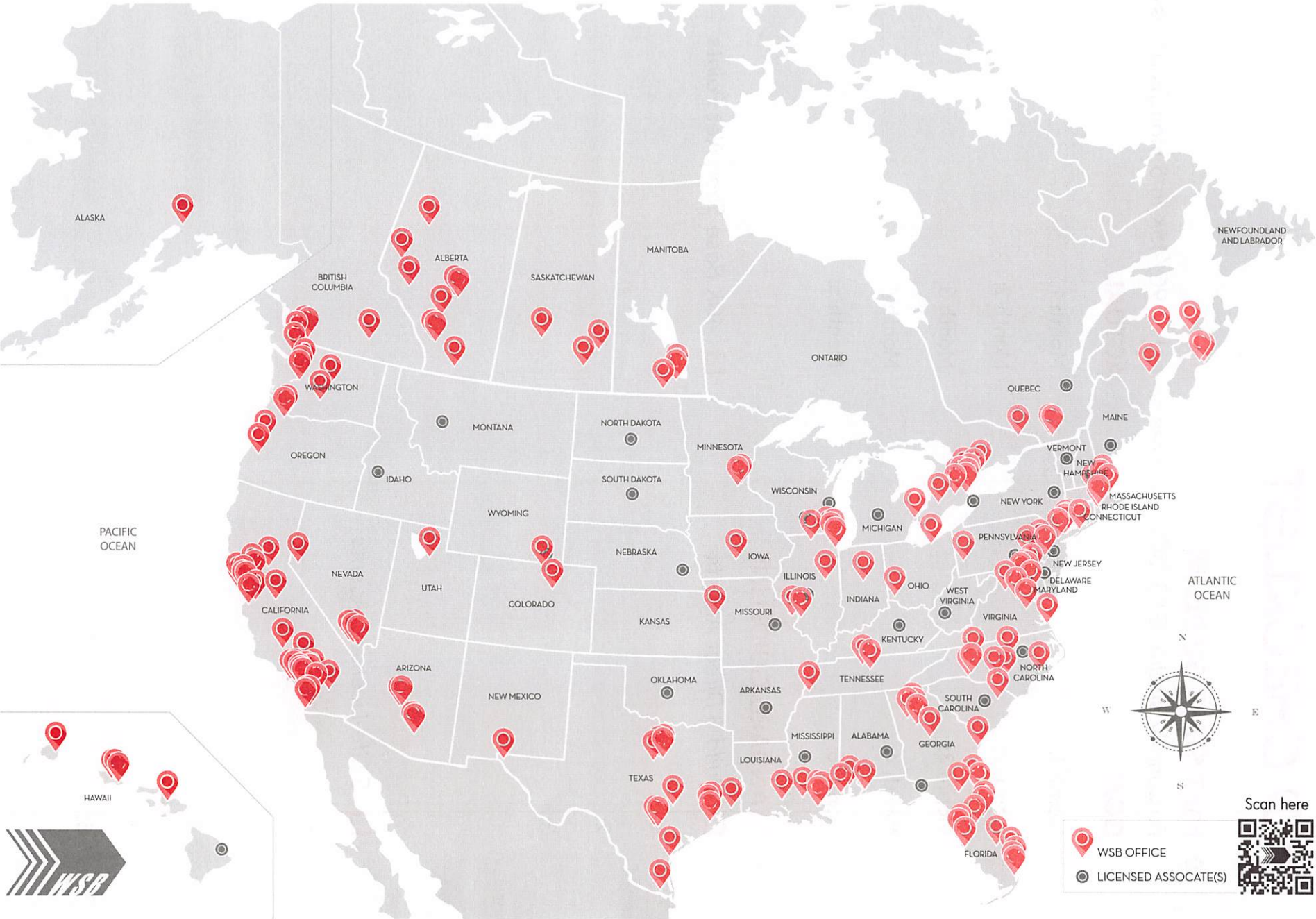
¹The alternative guidelines noted are only for production and cash flow. The agent must also meet the Agent/Legs, Licensed Agents, and Field Training appointments, as applicable, noted above.

For more specific advancement criteria, including qualifications for advancement levels above EVC, please go to MyWFG.com.

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WSB FINANCIAL EDUCATION CENTERS



MD CHECKLIST

❖ FAST START GUIDELINE

Personally qualify GX3 (3C/15K three times) or 9C/45K in 5 months or less.

GOAL

Month 1: _____ / _____

Month 2: _____ / _____

Month 3: _____ / _____

Month 4: _____ / _____

Month 5: _____ / _____

ACTUAL

Month 1: _____ / _____

Month 2: _____ / _____

Month 3: _____ / _____

Month 4: _____ / _____

Month 5: _____ / _____

❖ STANDARD GUIDELINE

Build 3 Direct Agents

1: _____

2: _____

3: _____

40K Base Shop Net Points

5 Life-Licensed Agents

1: _____

2: _____

3: _____

4: _____

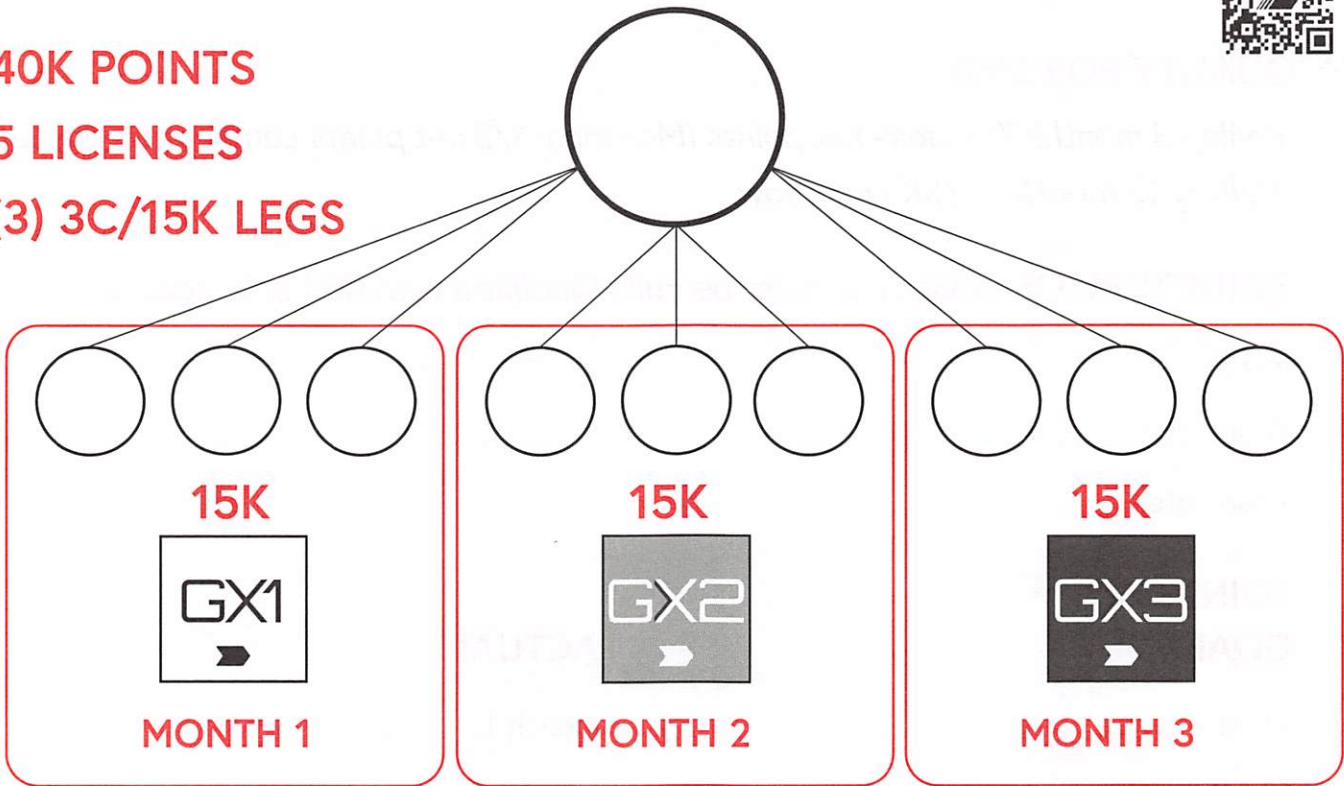
5: _____

RUN FOR MD

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- ❖ 40K POINTS
- ❖ 5 LICENSES
- ❖ (3) 3C/15K LEGS



❖ POINTS

	Name	Month 1	Month 2	Month 3
1.	_____	_____	_____	_____
2.	_____	_____	_____	_____
3.	_____	_____	_____	_____
4.	_____	_____	_____	_____
5.	_____	_____	_____	_____
6.	_____	_____	_____	_____
7.	_____	_____	_____	_____
8.	_____	_____	_____	_____
9.	_____	_____	_____	_____
10.	_____	_____	_____	_____
	Total	_____	_____	_____

❖ LICENSES

	Pre-Licensing	Date
1.	_____	_____
2.	_____	_____
3.	_____	_____
4.	_____	_____
5.	_____	_____

SMD CHECKLIST

❖ QUALIFY FOR SMD

*Rolling 3 months 75K base net points (Maximum 1/2 net points can be from any leg).
Rolling 12 months \$35K cash flow.*

❖ STRUCTURE OF LEGS: MD must be Fully Qualified with 40K in 3 months.

MD: _____

Associate: _____

Associate: _____

❖ POINTS

GOAL

Month 1: _____

Month 2: _____

Month 3: _____

ACTUAL

Month 1: _____

Month 2: _____

Month 3: _____

10 LIFE-LICENSED AGENTS

1: _____

2: _____

3: _____

4: _____

5: _____

6: _____

7: _____

8: _____

9: _____

10: _____

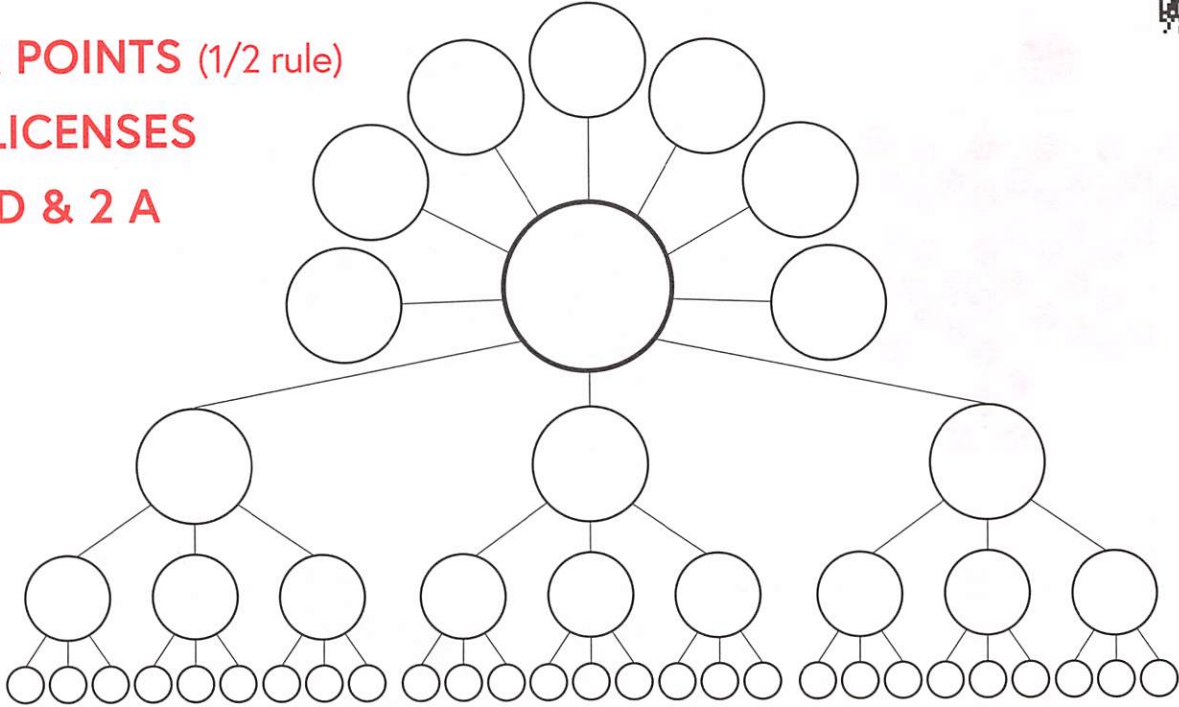
- 1) Show up early.**
- 2) Work the Trainer Guidebook.**
- 3) Fight for one result per day.**

– TUYEN NGUYEN

FAST START TO SMD



- ❖ 75K POINTS (1/2 rule)
- ❖ 10 LICENSES
- ❖ 1 MD & 2 A



❖ POINTS

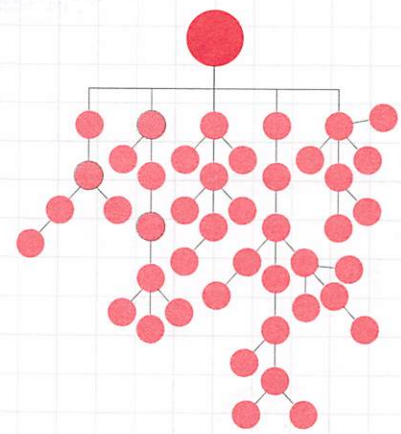
Name	Month 1	Month 2	Month 3
1. _____	_____	_____	_____
2. _____	_____	_____	_____
3. _____	_____	_____	_____
4. _____	_____	_____	_____
5. _____	_____	_____	_____
6. _____	_____	_____	_____
7. _____	_____	_____	_____
8. _____	_____	_____	_____
9. _____	_____	_____	_____
10. _____	_____	_____	_____
Total	_____	_____	_____

❖ LICENSES

	Pre-Licensing	Date
1. _____	1. _____	_____
2. _____	2. _____	_____
3. _____	3. _____	_____
4. _____	4. _____	_____
5. _____	5. _____	_____
6. _____	6. _____	_____
7. _____	7. _____	_____
8. _____	8. _____	_____
9. _____	9. _____	_____
10. _____	10. _____	_____

TEAM BUBBLE CHART

You cannot win without a team.
- COACH



Scan here



JANUARY

GOALS

SUN	MON	TUE	WED	THU	FRI	SAT
			1 New Year	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20 Martin Luther King, Jr. Day	21 GXPERIENCE Napa (21 - 23)	22	23	24	25
26	27	28	29 Lunar New Year	30	31	Register for WSB Launch 25 

GOALS FOR THE MONTH

Scan here



TEAM MEMBER	GOALS				ACTUAL							
	PERSONAL		BASE		WEEK 1		WEEK 2		WEEK 3		WEEK 4	
	CAMPAIGNER	SOLUTION	CAMPAIGNER	SOLUTION	CAMPAIGNER	SOLUTION	CAMPAIGNER	SOLUTION	CAMPAIGNER	SOLUTION	CAMPAIGNER	SOLUTION

GX QUALIFICATION WORKSHEET

Scan here



JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC
TOTAL GX STATUS											

19



3/15
Within 1 month



21/105
In rolling 7 months



6/30
In rolling 2 months



24/120
In rolling 8 months



9/45
In rolling 3 months



27/135
In rolling 9 months



12/60
In rolling 4 months



30/150
In rolling 10 months



15/75
In rolling 5 months



33/165
In rolling 11 months



18/90
In rolling 6 months



36/180
In rolling 12 months

MONITORING

12/29 - 1/4

People to the Meeting

1st BPM (Team) _____

1st BPM (Guests) _____

2nd BPM (Team) _____

2nd BPM (Guests) _____

Workshop (_____ / _____)

Workshop (_____ / _____)

Workshop (_____ / _____)

Workshop (_____ / _____)

Workshop (_____ / _____)

Workshop (_____ / _____)

TO DO:

- _____
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	SUN 29	MON 30	TUE 31
8am			
9am			
10am			
11am			
Noon			
1pm			
2pm			
3pm			
4pm			
5pm			
6pm			
7pm			
8pm			
9pm			



*You are one decision away from a totally different life. Don't be afraid to start over.
It is a brand new opportunity to rebuild what you truly want.* – STEVE QUACH

WED 1	THU 2	FRI 3	SAT 4	
				8am
				9am
				10am
				11am
				Noon
				1pm
				2pm
				3pm
				4pm
				5pm
				6pm
				7pm
				8pm
				9pm

MONITORING

1/5 - 1/11

People to the Meeting

- 1st BPM (Team) _____
- 1st BPM (Guests) _____
- 2nd BPM (Team) _____
- 2nd BPM (Guests) _____
- Workshop (_____ / _____)
- Workshop (_____ / _____)
- Workshop (_____ / _____)
- Workshop (_____ / _____)
- Workshop (_____ / _____)
- Workshop (_____ / _____)

TO DO:

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	SUN 5	MON 6	TUE 7
8am			
9am			
10am			
11am			
Noon			
1pm			
2pm			
3pm			
4pm			
5pm			
6pm			
7pm			
8pm			
9pm			



We are in love with what we do! I look forward to waking up and coming early to help families, to help every new campaigner we have on board, and to help all my Trainers win for their families! – PAM NGUYEN

WED 8	THU 9	FRI 10	SAT 11	
				8am
				9am
				10am
				11am
				Noon
				1pm
				2pm
				3pm
				4pm
				5pm
				6pm
				7pm
				8pm
				9pm

MONITORING

1/12 - 1/18

People to the Meeting

1st BPM (Team) _____

1st BPM (Guests) _____

2nd BPM (Team) _____

2nd BPM (Guests) _____

Workshop (_____ / _____)

Workshop (_____ / _____)

Workshop (_____ / _____)

Workshop (_____ / _____)

Workshop (_____ / _____)

Workshop (_____ / _____)

TO DO:

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	SUN 12	MON 13	TUE 14
--	--------	--------	--------

8am			
9am			
10am			
11am			
Noon			
1pm			
2pm			
3pm			
4pm			
5pm			
6pm			
7pm			
8pm			
9pm			

WSB Events



Show the way. Pave the way. Lead the way.

- JOSEPHINE ESTROPE

NAJ

WED 15	THU 16	FRI 17	SAT 18	
				8am
				9am
				10am
				11am
				Noon
				1pm
				2pm
				3pm
				4pm
				5pm
				6pm
				7pm
				8pm
				9pm

MONITORING

1/19 - 1/25

People to the Meeting

1st BPM (Team) _____

1st BPM (Guests) _____

2nd BPM (Team) _____

2nd BPM (Guests) _____

Workshop (_____ / _____)

Workshop (_____ / _____)

Workshop (_____ / _____)

Workshop (_____ / _____)

Workshop (_____ / _____)

Workshop (_____ / _____)

TO DO:

	SUN 19	MON 20	TUE 21
--	--------	--------	--------

8am			
9am			
10am			
11am			
Noon			
1pm			
2pm			
3pm			
4pm			
5pm			
6pm			
7pm			
8pm			
9pm			

WSB Events



You only live once. Why not do what you love?

- COACH

JAN

WED 22	THU 23	FRI 24	SAT 25	
				8am
				9am
				10am
				11am
				Noon
				1pm
				2pm
				3pm
				4pm
				5pm
				6pm
				7pm
				8pm
				9pm

MONITORING

1/26 - 2/1

People to the Meeting

1st BPM (Team) _____

1st BPM (Guests) _____

2nd BPM (Team) _____

2nd BPM (Guests) _____

Workshop (_____ / _____)

Workshop (_____ / _____)

Workshop (_____ / _____)

Workshop (_____ / _____)

Workshop (_____ / _____)

Workshop (_____ / _____)

TO DO:

	SUN 26	MON 27	TUE 28
8am			
9am			
10am			
11am			
Noon			
1pm			
2pm			
3pm			
4pm			
5pm			
6pm			
7pm			
8pm			
9pm			



Your beginnings start with a decision to change!

- ARIEL VELASQUEZ

JAN

WED 29	THU 30	FRI 31	SAT 1	
				8am
				9am
				10am
				11am
				Noon
				1pm
				2pm
				3pm
				4pm
				5pm
				6pm
				7pm
				8pm
				9pm

TEAM BUBBLE CHART

FEB

A large grid for drawing a team bubble chart. The grid is composed of small squares, approximately 20 columns wide and 30 rows high, providing a space for students to draw and label their team members and their relationships.

Scan here



DECEMBER

GOALS

SUN	MON	TUE	WED	THU	FRI	SAT
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15 Hanukkah	16	17	18	19	20
21	22	23	24	25 Christmas	26 Kwanzaa	27
28	29	30	31 New Year's Eve	Register for WSB Launch 26 		

GOALS FOR THE MONTH

Scan here



TEAM MEMBER	GOALS				ACTUAL							
	PERSONAL		BASE		WEEK 1		WEEK 2		WEEK 3		WEEK 4	
	CAMPAIGNER	SOLUTION	CAMPAIGNER	SOLUTION	CAMPAIGNER	SOLUTION	CAMPAIGNER	SOLUTION	CAMPAIGNER	SOLUTION	CAMPAIGNER	SOLUTION

GX QUALIFICATION WORKSHEET

Scan here



JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC
TOTAL GX STATUS											

181



3/15
Within 1 month



21/105
In rolling 7 months



6/30
In rolling 2 months



24/120
In rolling 8 months



9/45
In rolling 3 months



27/135
In rolling 9 months



12/60
In rolling 4 months



30/150
In rolling 10 months



15/75
In rolling 5 months



33/165
In rolling 11 months



18/90
In rolling 6 months



36/180
In rolling 12 months

_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

MONITORING

11/30 - 12/6

People to the Meeting

- 1st BPM (Team) _____
- 1st BPM (Guests) _____
- 2nd BPM (Team) _____
- 2nd BPM (Guests) _____
- Workshop (_____ / _____)
- Workshop (_____ / _____)
- Workshop (_____ / _____)
- Workshop (_____ / _____)
- Workshop (_____ / _____)
- Workshop (_____ / _____)

TO DO:

- _____
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	SUN 30	MON 1	TUE 2
--	--------	-------	-------

8am			
9am			
10am			
11am			
Noon			
1pm			
2pm			
3pm			
4pm			
5pm			
6pm			
7pm			
8pm			
9pm			

WSB Events



In challenging moments, it's normal to question yourself and others. Learn to understand yourself, pay attention to your thoughts, and consistently improve where needed. Keep building and growing. Look for that breakthrough. - SAM SITH

WED 3	THU 4	FRI 5	SAT 6	
				8am
				9am
				10am
				11am
				Noon
				1pm
				2pm
				3pm
				4pm
				5pm
				6pm
				7pm
				8pm
				9pm

MONITORING

12/7 - 12/13

People to the Meeting

1st BPM (Team) _____

1st BPM (Guests) _____

2nd BPM (Team) _____

2nd BPM (Guests) _____

Workshop (_____ / _____)

Workshop (_____ / _____)

Workshop (_____ / _____)

Workshop (_____ / _____)

Workshop (_____ / _____)

Workshop (_____ / _____)

TO DO:

- _____
- _____
- _____
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- _____

	SUN 7	MON 8	TUE 9
8am			
9am			
10am			
11am			
Noon			
1pm			
2pm			
3pm			
4pm			
5pm			
6pm			
7pm			
8pm			
9pm			



We truly live the dream. Thank you WSB for teaching us how to build a successful, reliable business, how to party, and how to live life. – PRISCA NKWOCHA

WED 10	THU 11	FRI 12	SAT 13	
				8am
				9am
				10am
				11am
				Noon
				1pm
				2pm
				3pm
				4pm
				5pm
				6pm
				7pm
				8pm
				9pm

MONITORING

12/14 - 12/20

People to the Meeting

- 1st BPM (Team) _____
- 1st BPM (Guests) _____
- 2nd BPM (Team) _____
- 2nd BPM (Guests) _____
- Workshop (_____ / _____)
- Workshop (_____ / _____)
- Workshop (_____ / _____)
- Workshop (_____ / _____)
- Workshop (_____ / _____)
- Workshop (_____ / _____)

TO DO:

- _____
- _____
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- _____
- _____
- _____
- _____
- _____

	SUN 14	MON 15	TUE 16
--	--------	--------	--------

8am			
9am			
10am			
11am			
Noon			
1pm			
2pm			
3pm			
4pm			
5pm			
6pm			
7pm			
8pm			
9pm			

WSB Events



If you know how to give, then you know how to earn.

- COACH

WED 17	THU 18	FRI 19	SAT 20	
				8am
				9am
				10am
				11am
				Noon
				1pm
				2pm
				3pm
				4pm
				5pm
				6pm
				7pm
				8pm
				9pm

MONITORING

12/21 - 12/27

People to the Meeting

1st BPM (Team) _____

1st BPM (Guests) _____

2nd BPM (Team) _____

2nd BPM (Guests) _____

Workshop (_____ / _____)

Workshop (_____ / _____)

Workshop (_____ / _____)

Workshop (_____ / _____)

Workshop (_____ / _____)

Workshop (_____ / _____)

TO DO:

	SUN 21	MON 22	TUE 23
8am			
9am			
10am			
11am			
Noon			
1pm			
2pm			
3pm			
4pm			
5pm			
6pm			
7pm			
8pm			
9pm			

WSB Events



Happiness is helping a friend become financially independent.

- COACH

WED 24	THU 25	FRI 26	SAT 27	
				8am
				9am
				10am
				11am
				Noon
				1pm
				2pm
				3pm
				4pm
				5pm
				6pm
				7pm
				8pm
				9pm

MONITORING

12/28 - 1/3

People to the Meeting

1st BPM (Team) _____

1st BPM (Guests) _____

2nd BPM (Team) _____

2nd BPM (Guests) _____

Workshop (_____ / _____)

Workshop (_____ / _____)

Workshop (_____ / _____)

Workshop (_____ / _____)

Workshop (_____ / _____)

Workshop (_____ / _____)

TO DO:

	SUN 28	MON 29	TUE 30
8am			
9am			
10am			
11am			
Noon			
1pm			
2pm			
3pm			
4pm			
5pm			
6pm			
7pm			
8pm			
9pm			

WSB Events



We found our purpose. We are here for the community and the world.

- ALICIA NGUYEN

WED 31	THU 1	FRI 2	SAT 3	
				8am
				9am
				10am
				11am
				Noon
				1pm
				2pm
				3pm
				4pm
				5pm
				6pm
				7pm
				8pm
				9pm

PERSONAL FINANCIAL STRATEGY

BUILDING A SOLID FINANCIAL FOUNDATION

Date _____

Client Name _____ DOB _____ Child Name _____ DOB _____
 Spouse Name _____ DOB _____ Child Name _____ DOB _____
 Address _____
 Phone _____
 Email _____

CONCERNS

- Too many bills/debts
- Lack of savings/investments
- Children's future (higher education, career)
- Healthcare (disability, long term illness)
- Wealth transfer (life insurance, funeral, documentation)
- Income stability (job, career, business)
- Lack of financial knowledge
- Other _____

GOALS (Emergency Fund, Proper Protection, Education, Retirement, Home, Parents, Vacation/Travel)

LESS THAN 1 YEAR	1 - 5 YEARS	5+ YEARS

MONTHLY INCOME

Client Occupation _____ Primary _____ Secondary _____ TOTAL INCOME _____
 Spouse Occupation _____ Primary _____ Secondary _____ TOTAL INCOME _____

ASSETS

Type/Company	Value	Contribution
Market Value of Home(s)	_____	_____
Mutual Funds/Stocks	_____	_____
Savings Account	_____	_____
Checking Account	_____	_____
Retirement Account	_____	_____
Client Life Insurance Policy	_____	_____
Spouse Life Insurance Policy	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
ASSETS TOTAL	_____	_____

MONTHLY EXPENSES

Mortgage/Rent	_____
Mortgage Insurance	_____
Property Insurance	_____
Property Taxes	_____
HOA	_____
Utilities (Elec./Gas/Water)	_____
Home Maintenance	_____
Internet	_____
Cable/Streaming	_____
Groceries/Dining/Delivery	_____
Pet Expenses	_____
Car Payment	_____
Car Insurance	_____
Car Maintenance/Gas	_____
Ride Sharing	_____
Cell Phone	_____
Recreation/Hobby	_____
Subscription Service(s)	_____
Membership(s)	_____
Medical	_____
Health Insurance	_____
Personal/Self-Care	_____
Clothing	_____
Child care/Babysitting	_____
School Tuition/Materials	_____
_____	_____
_____	_____
_____	_____
_____	_____
TOTAL EXPENSES	_____

LIABILITIES

Type/Company	Value	Contribution
Mortgage	_____	_____
2nd Mortgage	_____	_____
Car Loan	_____	_____
Credit Cards	_____	_____
Personal Loans	_____	_____
Other Debt/Loans	_____	_____
_____	_____	_____
_____	_____	_____
LIABILITIES TOTAL	_____	_____

MONTHLY CASH FLOW CALCULATION

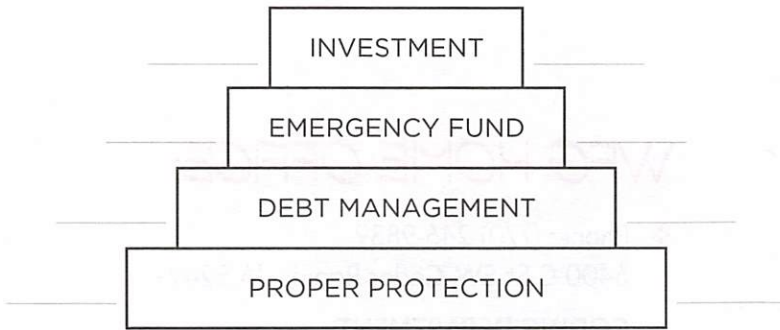
_____ - _____ - _____ - _____ = _____
 Total Income - Total Asset Contribution - Total Liability Contribution - Total Monthly Expenses = MONTHLY CASH FLOW

ESTATE PRESERVATION

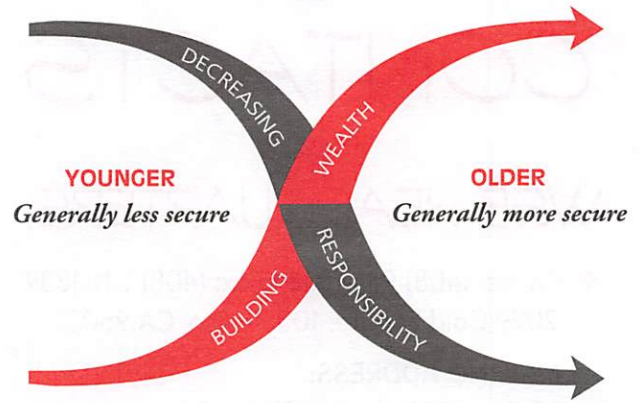
Will Trust Personal Directives Power of Attorney Last Wishes Guardianship Secure Storage
 Date last reviewed: _____ Who is Informed? _____

Follow-up Appointment Date _____ Client Signature _____

FINANCIAL FOUNDATION



X-CURVE



D.I.M.E. METHOD

	CLIENT	SPOUSE
Debt	_____	_____
Income (x10)	_____	_____
Mortgage	_____	_____
Education	_____	_____
INSURABLE NEED	_____	_____

WEALTH FORMULA

$$\begin{aligned} & \text{Money} \\ & + \text{Time} \\ & +/\text{- Rate of Return} \\ & - \text{Tax} \\ & - \text{Inflation} \end{aligned}$$

WEALTH

NOTES

MANAGED GROWTH

GROWTH	SAFETY
TAX ADVANTAGE	PROTECTION



FINANCIAL EDUCATION FOR ALL

Our mission is to help build and protect wealth for families. We want to help people move from financial insecurity to financial independence. The goal of our National Financial Literacy Campaign is to educate 30 million families by 2030.

Scan here



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- ❖ **ASA GROUP [Lab results]:** (800) 768-2056

(Updated as of September 2024)

NOTES

1. The first part of the book is devoted to a general introduction to the subject of the book. It is written in a clear and concise style, and is highly readable. It is a good starting point for anyone who is new to the subject.

2. The second part of the book is devoted to a detailed discussion of the various aspects of the subject. It is written in a more technical style, and is highly detailed. It is a good reference for anyone who is already familiar with the subject.

3. The third part of the book is devoted to a discussion of the various applications of the subject. It is written in a more practical style, and is highly detailed. It is a good reference for anyone who is interested in the practical aspects of the subject.

4. The fourth part of the book is devoted to a discussion of the various future developments of the subject. It is written in a more speculative style, and is highly detailed. It is a good reference for anyone who is interested in the future of the subject.

5. The fifth part of the book is devoted to a discussion of the various current developments of the subject. It is written in a more up-to-date style, and is highly detailed. It is a good reference for anyone who is interested in the current state of the subject.

6. The sixth part of the book is devoted to a discussion of the various historical developments of the subject. It is written in a more historical style, and is highly detailed. It is a good reference for anyone who is interested in the history of the subject.

7. The seventh part of the book is devoted to a discussion of the various philosophical aspects of the subject. It is written in a more philosophical style, and is highly detailed. It is a good reference for anyone who is interested in the philosophical aspects of the subject.

8. The eighth part of the book is devoted to a discussion of the various legal aspects of the subject. It is written in a more legal style, and is highly detailed. It is a good reference for anyone who is interested in the legal aspects of the subject.

NOTES

The following footnotes pertain to information on page 10.

- 1 WFG's advancement guidelines are subject to change at any time. Unless otherwise specified, advancement guidelines are for all WFG associates.
- 2 Advancement requires approval of the direct upline SMD.
- 3 Advancement to SMD requires the associate to be life licensed and the approval of the direct SMD and CEO MD.
- 4 An exchange leg only occurs once upon an advancement to SMD, with exceptions if the SMD is demoted.
- 5 To achieve and maintain an advancement to SMD, an associate must be life licensed. Additionally, the associate must maintain an acceptable Tracked Block of Business (60% minimum) for six (6) months following the advancement. If the associate does not maintain an active life license, he/she will be demoted to an MD (Level 17) and the exchange leg(s) will not be restored to the original upline. If the SMD is demoted to an MD (Level 17) due to Tracked Block of Business, the exchange leg(s) is returned to the original upline. Once an associate is demoted, the associate must wait one year before he/she can re-qualify for the SMD level and, at the time of re-qualification, the first upline SMD has the option to select an exchange leg.
- 6 An associate may use up to one-half of personal net points and up to one-half net points from any one leg. Flanked points can be used for an advancement to SMD as long as the flanking occurred when a downline is the same level as the upline MD (Level 17) - not including transfers. For more information on flanked points, please go to MyWFG.com.
- 7 The associate must have an acceptable Net Point Ratio (NPR) to qualify for an advancement.
- 8 Points/Legs earned through the Base Shop Standard of Excellence will not count toward advancements. Please see MyWFG.com for more information on the Base Shop Standards of Excellence.
- 9 To achieve and maintain an EMD level advancement, an associate must be life licensed. To achieve and maintain a CEO MD, EVC or higher level advancement, an associate must be life and securities licensed. Additionally, the associate must maintain an acceptable Tracked Block of Business (60% minimum) for six (6) months following the advancement. If a TBB of 60% or higher is not maintained, the EMD will be demoted to SMD, the CEO MD will be demoted to EMD or the EVC will be demoted to CEO MD, as applicable. Once you are demoted, you must wait one year before you can re-qualify for that level.
- 10 An exception promotion to Senior Marketing Director (SMD - Level 20) will not count as a leg toward an upline's Executive Level advancement until the exception SMD fulfills the published requirements to become a qualified SMD. All exception promotions must be reviewed and approved by the WFG Home Office. If the exception promotion is granted, the exception SMD will have six (6) months to become a Qualified SMD - Level 20 by meeting all of the published requirements. If the associate does not meet the qualified SMD guidelines within six (6) months, their level will be changed to Marketing Director (MD - Level 17). In addition, if a Builder's Exchange was taken at the time of the exception SMD promotion, the exchange leg(s) is returned to the original upline. A recent Transfer, Map or Reinstatement cannot count as a qualified SMD leg for a period of 12 months. Once you are demoted, you must wait one year before you can re-qualify for that level.
- 11 For EMD and CEO MD advancement levels, no more than one-half (1/2) Net points can be from any other leg or the associate's own base shop.
- 12 No more one-third (1/3) Net points can be from any other leg or the associate's own base shop.

Designed by Tammy Luong.

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