

# **Master Builder's Fast Start Manual**

## New Agent Checklist

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

- ☐ Contracting Paperwork
- ☐ Lead Partnership Agreement
- ☐ Go over the Getting Started Right document
- ☐ List of Top 25 people they know age 50-85
- ☐ 3 days of Field Training/Shadowing
- ☐ Set up UBI training website at [www.ubiu24.com](http://www.ubiu24.com)
- ☐ View the Forms, Rate Book, and Presentation webinars
- ☐ Set up Lincoln Heritage agent portal at [www.lhlicagents.com](http://www.lhlicagents.com)
- ☐ Order Business Cards
- ☐ Register for the New Agent Training Class (Bootcamp)
- ☐ Attend First Friday
- ☐ Live Lead Webinar one time (Mondays at 6pm)

# Getting Started Right with Lincoln Heritage

Lincoln Heritage Agent Website  
[www.lhlicagents.com](http://www.lhlicagents.com)  
800-433-8181

Universal Benefits  
[www.ubi24.com](http://www.ubi24.com)  
803-773-1838

- ☐ Make a list of 25 people you know aged 50-85 and set appointments with them so you can do practice presentations and get some immediate sales. Script: "I just got hired to work for a new company and I need your help. For my training I have to do 10 appointments with my manager. I'm calling to see if you could help me out and be one of my 10 so I can get my credit. Will you do that for me?"
  
- ☐ **Requirements to get leads:** 1.) Complete the Lead Partnership Agreement 2.) Attend the Live Lead webinar Monday at 6pm 3.) Attend the New Agent Training Class (Bootcamp) 4.) 3 days of Field Training (shadow another agent)
- ☐ Register on the UBI (Universal Benefits Inc.) training website at [www.UBIU24.com](http://www.UBIU24.com). Our director is Ted Wilson Jr. and his director's code is TJ519
  
- ☐ On [www.ubi24.com](http://www.ubi24.com) click on "Webinar Videos." The 4 most important trainings for you to do are in this section ( Forms and Website, Presentation, Rate Book, and lead Trainings). They give you a foundation for your business. **FIELD TRAINING IS NOT THE TIME TO LEARN THIS INFO. LEARN THESE BASICS ON YOUR OWN TIME.**
  
- ☐ When you receive your Lincoln Heritage Agent number you can set up your agent portal at [www.lhlicagents.com](http://www.lhlicagents.com). This is where you access eApp, order your supplies, download your lead, track your business, and order your business cards.

\*\*\* After your initial 3 days of field trainings. 1 day per week of field training for the next 4-6 weeks.

## Monday Training Day

I Heart Conference Call: Every Monday 7am & 9pm	267-807-9605	Pin 549613#
Nuts & Bolts training call Wednesday at 8:23am	848-777-1500	Pin 09221977#
UBI National Call: Monday 8am	848-777-1500	Pin 9204197#
Master Builders Call: Monday 8pm	267-807-9605	Pin 549613





## Pass Your Exam on the First Try!

Your First Step to Becoming a Licensed Insurance Agent

### 1 HEART INSURANCE GROUP

has partnered with XCEL Solutions to help students pass the insurance agent license exam! Visit the partner site below to receive special preferred pricing for the Pre-licensing Course.

**Preferred Partner  
Pricing**

**\$39.99**

Originally: \$199

\*State reporting fees or taxes will be added at checkout

## Enroll in 5 Easy Steps!

**STEP 1** Visit Partner Site: [partners.xcelsolutions.com/1heart](https://partners.xcelsolutions.com/1heart)

Same as visiting xcelsolutions.com then entering Partner Code (1heart) in the pop-up box

**STEP 2** In the dropdowns, select your STATE OF RESIDENCE, GET LICENSED, & LIFE

**EXAMPLE:**

State	Education	Line of authority	
Alaska	Get license	Life	Find courses

**STEP 3** SELECT A PACKAGE, ADD TO CART, GO TO CHECKOUT

CONSIDER OUR PREMIER PACKAGE: includes a multi-lingual Recorded Review Class | Flashcards | Pass Guarantee!

**STEP 4** CREATE ACCOUNT then input student name, email, and a password

**STEP 5** ENTER STUDENT INFO (we report this info to the State; must match formal I.D.), then complete checkout

**THE WELCOME EMAIL WILL CONTAIN SPECIFIC LOGIN LINK, AS WELL AS IMPORTANT COURSE INFORMATION!**

STUDENT SUPPORT: [support@xcelsolutions.com](mailto:support@xcelsolutions.com)

Need Assistance? 866-559-9235

MANAGER SUPPORT: [clientservices@xcelsolutions.com](mailto:clientservices@xcelsolutions.com)



# TOP 25

**Business:** Credible, Hungry, Motivated, Competitive, People Skills - One point for each

**Client:** Married, Age 25 - 55, Children under 16, Homeowner, Income over \$30,000 - One point for each

	Name	Phone	Address	Business	Client
1					
2					
3					
4					
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25					



*Universal Benefits, Inc.*

## 2025 UBIU BOOTCAMP TRAINING CALENDAR

*(includes First Friday Dates)*

Month	Boot Camp Training Sessions		1 <sup>st</sup> FRIDAYS
May	13 <sup>th</sup> , 14 <sup>th</sup> , & 15 <sup>th</sup>	27 <sup>th</sup> , 28 <sup>th</sup> , & 29 <sup>th</sup>	9 <sup>th</sup>
June	3 <sup>rd</sup> , 4 <sup>th</sup> , & 5 <sup>th</sup>	24 <sup>th</sup> , 25 <sup>th</sup> , & 26 <sup>th</sup>	6 <sup>th</sup>
July	8 <sup>th</sup> , 9 <sup>th</sup> , & 10 <sup>th</sup>	22 <sup>nd</sup> , 23 <sup>rd</sup> , & 24 <sup>th</sup>	11 <sup>th</sup>
August	5 <sup>th</sup> , 6 <sup>th</sup> & 7 <sup>th</sup>	19 <sup>th</sup> , 20 <sup>th</sup> , & 21 <sup>st</sup>	8 <sup>th</sup>
September	2 <sup>nd</sup> , 3 <sup>rd</sup> , & 4 <sup>th</sup>	16 <sup>th</sup> , 17 <sup>th</sup> , & 18 <sup>th</sup>	30 <sup>th</sup> , Oct. 1 <sup>st</sup> & 2 <sup>nd</sup>
October	14 <sup>th</sup> , 15 <sup>th</sup> , & 16 <sup>th</sup>	28 <sup>th</sup> , 29 <sup>th</sup> , & 30 <sup>th</sup>	10 <sup>th</sup>
November	11 <sup>th</sup> , 12 <sup>th</sup> , & 13 <sup>th</sup>	18 <sup>th</sup> , 19 <sup>th</sup> , & 20 <sup>th</sup>	7 <sup>th</sup>
December	9 <sup>th</sup> , 10 <sup>th</sup> , & 11 <sup>th</sup>		5 <sup>th</sup>

### F.C.G.S. Meeting Dates

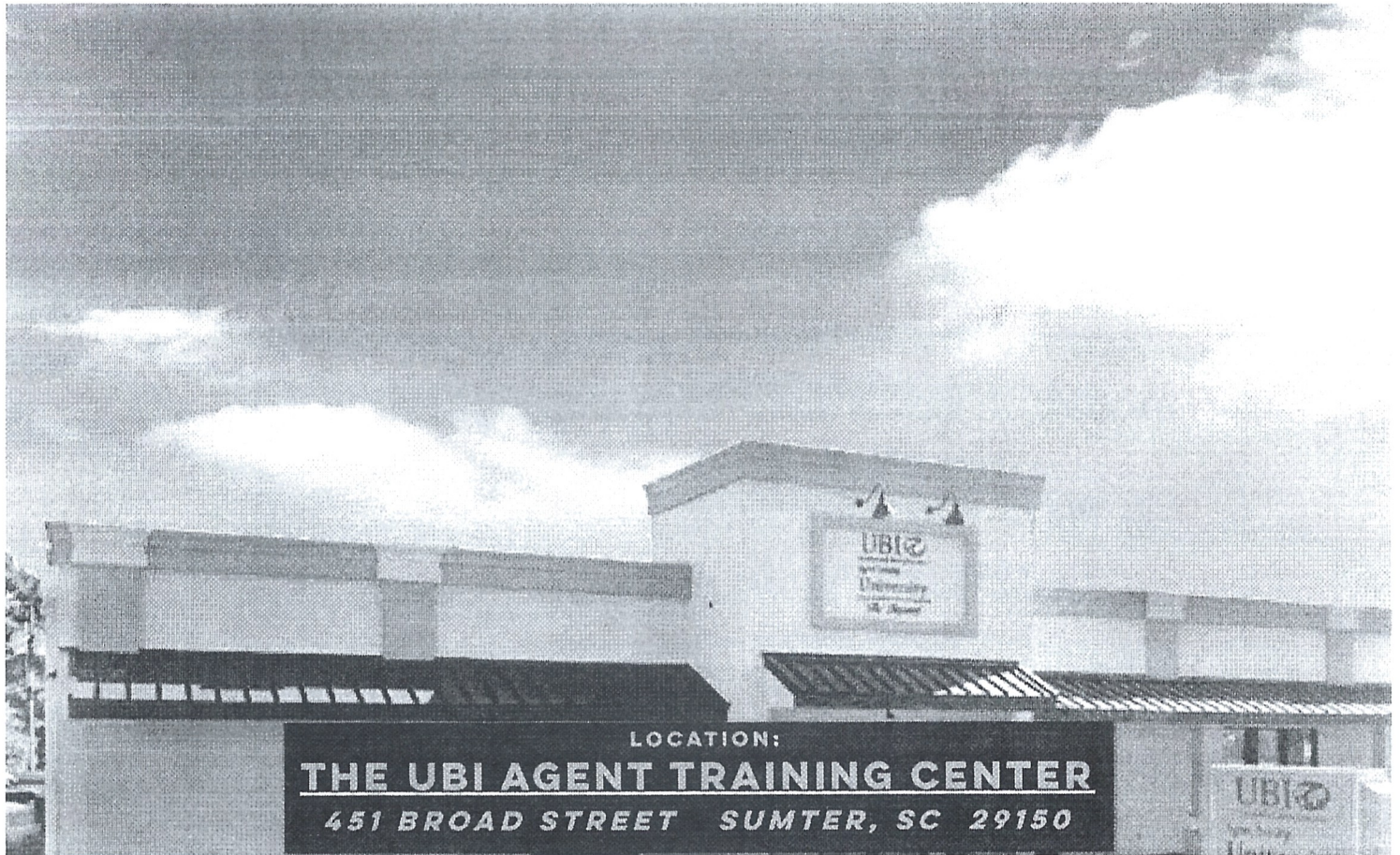
**June 10 – (For D.C., Maryland, & Virginia Agents)**

**June 11 – (For New Jersey & Delaware Agents)**

**June 17 – (For Lower VA, N.C., & S.C. Agents)**

**June 18 – (For Georgia Agents)**





*OUR HIGHEST PRODUCING AGENTS HAVE ATTENDED BOOT CAMP!*

# 3 DAY BOOTCAMP

## FINAL EXPENSE TRAINING

**\*VALUED AT** • OFFICIAL BOOT CAMP MATERIALS  
**\$3,995** • 3 FULL DAYS OF DEDICATED TRAINING  
• LIFETIME MENTORSHIP & ONGOING WEEKLY TRAINING

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**NOW ONLY**  
**\$295.00**

**ALUMNI AGENTS**  
**\$195.00**



**REGISTER FOR  
 THE NEXT  
 UBI UNIVESITY  
 BOOT CAMP  
 SESSION  
 TODAY!**

**JULY 8<sup>TH</sup>**

**JULY 9<sup>TH</sup>**

**JULY 10<sup>TH</sup>**

HOTEL / ACCOMODATIONS

REGISTRATION

2025 SCHEDULE

## THE VALUE OF ATTENDING BOOT CAMP

### Advantages

### Disadvantages

DAILY ADVANCE COMMISSIONS (PAID ON SUBMIT)	VS	NO DAILY ADVANCE COMMISSION (PAID ON ISSUE)
LEAD FINANCING AVAILABLE! (NO UPFRONT COSTS)	VS	NO LEAD FINANCING AVAILABLE
PAY THRU STARTS THE <b>2ND MONTH!</b>	VS	PAY THRU STARTS THE 10TH, 11TH, & 12TH MONTH
<b>50%</b> CHARGEBACK	VS	<b>100%</b> CHARGEBACK

*For any Questions, Comments or Concerns please contact  
 Rene Kelley using (404) 925-7900 or myubi24@gmail.com.com  
 For any Questions regarding Payment, please contact Amanda  
 using (803) 773 - 1838 or finance@ubimf.com*



## RENE KELLEY

UBIU Dean

I have been with UBI for 14 exciting years. During this time I have humbly & quietly participated in the training of new agents for Universal Benefits, Inc., a multi-million dollar operation in South Carolina working with great, talented, loyal and humble people. With the knowledge and experience gained through trial and error, I'm always striving to perfect the system and help agents avoid the mistakes many agents, including me, have made.

Throughout those learning curves UBI and Lincoln Heritage have been right there time and time again, never wavered and continually growing. I have a burning passion and conviction for what we do.

*My visions for the future are twofold:*

1. To provide a stable environment for hundreds of partnering agents in our territories by conducting business the right way and putting our agents first.
2. To continue to provide the best customer service and to be there for our clients on one of the worst days of their lives. It is truly a wonderful feeling being a leader at a company where you are helping clients through the worst times of their lives. It is an equally wonderful feeling watching our agents achieve their own personal financial goals, and being able to do the important things in life like spending time with their families, sending their children to college, purchasing a home, taking extended vacations, contributing to churches, charities, or organizations to better their communities.

UBI is here to provide you with an opportunity to meet your financial goals with a tested, proven and rewarding system. If your goal is to earn \$50,000, \$75,000, \$100,000, \$250,000 or \$500,000 a year, I would like to help you meet that goal. Just know that your potential commissions depend on you and how hard you are willing to work and trust in our system.

If this sounds like something you would be interested in committing to,  
I look forward to speaking with and training you.



I joined the highly successful Universal Benefits Marketing Firm in 2009. I quickly developed a strong understanding of the Universal Benefits sales system and was given the opportunity to become the national sales director in 2014. I am part of a 3 man training team running monthly final expense bootcamps to introduce new agents to our dynamic system. I am honored to be a part of this remarkable company as national training director.



I am a native of Sumter, SC. I have been with UBI for over 14 years. As a graduate from South Carolina State University with a dual Engineering degree, I worked in corporate America for 20 years. After 10 of my colleagues and myself began

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agent and to help grow the company. With this amazing system, the income I worked 20 years to get, the system allowed me the opportunity to make that in a couple of years.

I am blessed to have Dr. Wilson have confidence in me to help grow UBI by teaching the best Training and Development Program in Final Expense with the best business partners in Rene Kelley and Fred Hawkins. We have helped train over 2800 agents since 2016, creating tens of millions of dollars for our agents and our policyholders. I am excited about the years to come with this great company.