This powerful resource developed by the company's experienced field leadership is a step-by-step blueprint that can help you build and grow your business. The system guides you on how to grow a client base, bring new associates into the business, mentor new associates, develop a game plan for success, and much more.

WFG has a solid and strong reputation for helping families across North America have better financial futures. As an associate, you can leverage the WFG brand by use of the company’s name, logo, image and marketing materials.

You Have Access

Investing in your future is the best investment you can make. When you pay World Financial Group’s WFOU $100 (USD)/$125 (CAD) complete an Associate Membership Agreement and Application, and become an associate, you open the door to a wealth of resources that can help you build a strong, long-lasting business and a brighter future.

You have access to world-class tools that can help you build a business of your own, but not on your own. These resources include the WFG business platform and the back office support you’ll need to help you be successful.

This brochure provides an overview of just some of the resources you can use as a WFG associate. Read on to learn how you can use these tools and the support of the WFG home office to build the business of your dreams.

The WFG Business System

A Foundation for Your Success

A Transamerica Company
MyWFG.com, the associate’s intranet, is filled with tools and information to help you build your business. As a new associate, it’s important to become familiar with MyWFG as it is a resource that you will use over and over again in your business. Some of the information and tools you’ll find here include:

Presentation Builder
You can create customized slideshow presentations that you can save to your smartphone, tablet or laptop, giving you convenient access when you’re on the road. There are also numerous WFG-created marketing materials that are available to you.

Reports
There are a variety of reports that provide information on your business. These include commission information, team status reports, cash flow reports, licensing reports and more.

WFG Talks
This section has audio and video selections from some of the best WFG field leaders and from major company events. The messages offer mentoring, coaching and inspiration to help you build a successful WFG business.

Contest & Event Information
MyWFG includes information on WFG contests and events.

Back Office Support
System (BOSS)
Eliminate the need to fax or email forms to the home office. BOSS lets you complete forms online, allowing them to be processed faster.

Contact Manager
This allows you to enter and view all your contacts and filter them using specific qualifiers. You can also port the information to specific tools that can help you streamline your recruiting and sales processes. Also, keep track of what events your new contact is attending or take note of what concerns he/she might have.

Access to Industry Leading Product Providers
As a licensed associate, you have access to a multitude of products provided through WFG’s affiliated companies. You aren’t captive to a particular company or product, instead you are connected to well-known, top-tier companies so you can offer your clients the power of choice.

Licensing
As a WFG associate, you have access to WFG-approved vendors who offer training to prepare you for your licensing examinations to help advance your career. These programs are usually available at a discounted rate for WFG associates.

Campaign Manager
The WFG Sales Desk is a team of fully-licensed specialists who are knowledgeable about the products and services offered through WFG’s affiliated companies. Sales Desk representatives offer you expert-level information to help you feel confident when presenting products with clients.

WFG Home Office Support Team (HOST)
The WFG Home Office Support Team (HOST) is the in-house associate services team that is ready to help you. If you have any questions about coding, commissions, licensing, services, technical support or any other concerns, they are an excellent resource for you. Contact HOST in Canada at (416) 225-2121, in the United States and Puerto Rico, please call HOST at (770) 246-9889. All associates can email the HOST team at wfghost@transamerica.com.

WFG Drive
WFG also provides you with a variety of mobile tools through WFG Drive, an app that allows you to perform a Financial Needs Analysis, run illustrations, and complete sales no matter where you are as long as you have Internet access. It also makes it easier for you to sign up new WFG associates via access to the electronic AMA (e-AMA).

Let’s Get Started
Now that you have seen a sample of the assistance, tools and resources at WFG, begin building a business as large as your dreams. With these resources at your disposal, nothing is standing in the way of your success and determination. You are your own boss, so take full advantage of all WFG offers, and let it empower you to take charge of your career and your financial future.