

## **For Licensed Rep Use Only**

### **Enter a Person's Info to Start Client Prospect Emails**

**Person's Email\***  
**Person's First Name\***  
**Person's Last Name\***  
**Person's Cell Number**

The rest of the fields are your information as a licensed representative.

**Rep's First Name**  
**Rep's Last Name**

If you do not have acuity set up per the instructions, zoom set up and linked to acuity, and a profile page under the meet some of our guides page. **STOP HERE!! DO NOT GO ANY FURTHER.**

Any email responses will be sent to the office email and appointments will be set up through the office acuity calendar. If you are independent and are available to meet with the prospective client, you will have that opportunity. If you are not, you will be written as the 2<sup>nd</sup> rep on any business that you are licensed for. **Again STOP HERE. Do NOT input any more information.**

**Check the Captcha and submit the info.**

**IF** your acuity and zoom are set up and linked together  
**AND** you are independent  
**AND** you have a profile on the "Meet Some of Our Guides" page  
**AND** you want to meet with people when they are ready to set appointments.  
**THEN CONTINUE ENTERING YOUR INFORMATION.**

<b>Rep's Company:</b>	<b>WayMaker Financial</b>
<b>Mark your Title:</b>	<b>Financial Guide / Advisor</b>
<b>Rep's Phone Number:</b>	<b>434-390-1380 (with dashes)</b>
<b>Rep's Email:</b>	<b>brian@waymakerfinancial.com</b>
<b>Rep's MAILTO Link:</b>	<b>mailto:brian@waymakerfinancial.com</b>
<b>Rep's Event Link:</b>	<b><a href="https://www.waymakerfinancial.com/events">https://www.waymakerfinancial.com/events</a></b>
<b>Rep's Bio Link:</b>	<b><a href="http://www.waymakerfinancial.com/meet-our-guides/brian">www.waymakerfinancial.com/meet-our-guides/brian</a></b>
<b>Rep's General Acuity Link:</b>	<b><a href="https://waymakerfinancial.as.me/">https://waymakerfinancial.as.me/</a></b>
<b>Rep's Client Acuity Link:</b>	<b><a href="https://waymakerfinancial.as.me/">https://waymakerfinancial.as.me/</a></b>
<b>Rep's Recruit Acuity Link:</b>	<b><a href="https://waymakerfinancial.as.me/become-a-guide">https://waymakerfinancial.as.me/become-a-guide</a></b>
<b>Rep's Host Acuity Link:</b>	<b><a href="https://waymakerfinancial.as.me/host-a-financial-wellness-workshop">https://waymakerfinancial.as.me/host-a-financial-wellness-workshop</a></b>

Check the Captcha and submit the info.