

Name \_\_\_\_\_ Sponsor \_\_\_\_\_  
Distributor ID \_\_\_\_\_ Phone # \_\_\_\_\_  
Email Address \_\_\_\_\_ Q-Date \_\_\_\_\_  
Rep ID# \_\_\_\_\_ Password \_\_\_\_\_  
Preferred Customer # \_\_\_\_\_ Password \_\_\_\_\_

#### AT SIGN UP

- Submit Application
- Subscribe to UFMS during Sign-Up Wizard
- Subscribe to PAT Live (optional) ATG# \_\_\_\_\_
- Submit Product Order
- Set Up Transfer Buy Form (check insured transfer buyer)
- 50 BV
- 100 BV (after first check)
- 150 BV (after first \$1,500)
- Order UFMS on Transfer Buy
- Submit Form 1001
- Submit Form 925

#### POST SIGN UP

- Apply for a Sales Tax License through county office, as applicable
- Log on to unfranchise.com using Rep ID and temporary password [change password]
- Subscribe to email notification
- Designate Incentive Business Development Center (IBDC)
- Set BV and IBV auto placement options

- o Customize Web Portal [www.marketamerica.com/](http://www.marketamerica.com/) \_\_\_\_\_
- o Schedule Required Trainings
- o New Distributor Training (NDT) \_\_\_\_\_
- o Basic 5 (B5) \_\_\_\_\_
- o Executive Coordinator Certification Training (ECCT) \_\_\_\_\_
- o Learn to register preferred customers
- o Learn to create a Sales Receipt Entry
- o Learn how to read management reports on UFMS

#### IMPORTANT DATES AND ADMINISTRATIVE TASKS

- o Submit Form 1000 (quarterly for your 001)
- o First Due: \_\_\_\_\_
- o Second Due: \_\_\_\_\_
- o Third Due: \_\_\_\_\_
- o Fourth Due: \_\_\_\_\_
- o Submit Form 1000 one time only on qualified 002, 003, etc... upon Qualifying each
- o Submit Annual Renewal Form 1052
- o Annual Renewal Date: \_\_\_\_\_
- o Remember to:
- o Keep credit card information in UFMS and Transfer Buying up-to-date
- o Read Your Alerts
- o Set up Personal Alerts
- o File Tax with the State (as per arrangement)

#### COMPANY WEBSITES

- o [www.unfranchisetraining.com](http://www.unfranchisetraining.com) (user name: distributor / password: gonow)
- o [www.marketamericascience.com](http://www.marketamericascience.com)
- o [www.thepowerprofiles.com](http://www.thepowerprofiles.com)
- o [www.nutrametrix.com](http://www.nutrametrix.com)
- o [www.transitionslifestyle.com](http://www.transitionslifestyle.com)
- o [www.torchsports.com](http://www.torchsports.com)