

All New Partners Checklist if you decide to apply to join Pacific Investors:

Prospective partner's name: _____

As of 11.02.2024

Read the Pacific Investors Fact Sheet and Partnership Agreement found at our web site at: www.PacificInvestors.net. **When you have decided to join you should make an appointment with Bruce** and on our resources page **find, read, print, fill out, sign, and bring to your appointment:** 1) **your application**, 2) your **application fee** (with a check, for the fee, payable to Bruce Ellis for \$_____), 3) **photocopy of your driver's license**, 4) **account form**, 5) a signed **Partner Responsibilities Agreement**, and 6) **Partnership agreement signature page**.

You need to bring the above items, and the following information to your appointment with Bruce: He will have you fill out any paperwork not already completed: 1) Pacific Investors Application and the application fee. 2) Account form. 3) Partnership agreement signature page. 4) Proxy forms. 5) Photocopy of your driver's license. 6) a signed Partner's Responsibilities Agreement. 7) Email Bruce your Photo Intro picture with a one sentence statement on why you want to join Pacific Investors.

At the next Pacific meeting, you will have the opportunity to say whatever you would like, the partners will ask you any questions, we will excuse you from the meeting to vote on your application. **Bruce will call you about the results after the meeting.** Your Pacific Investors **application fee pays for the books on our curriculum sheet, and** for our paperwork processing cost. Bruce gives you those books after the meeting, if you do not already have them, if you live more than 75 miles away, he mails them to you. Bruce emails you (the new partner) a list of items (from above) that you have not yet provided.

- 1) Bruce emails you a website **invitation**; you will need to **respond to it to gain access to our web site**. Please check your spam folder for the invitation. This is coming to you from a new email address.
- 2) Bruce emails you (the new partner) **your Pacific Investors partner number**. _____
- 3) Bruce emails you **your tutor's contact information, for your training**.

Your PI mentor needs to help you with:

- 1) Set up, with the new partner, **a set time for a 15-minute phone call** each week.
- 2) Make sure the new partner has accessed/signed in on our PI bivio website. Show them their partner folder where they will enter their homework.
- 3) Make sure the new partner has installed **TeamViewer and or Zoom** on their laptop/computer.
- 4) Work with them at least three times on TeamViewer and or Zoom communications use of the software, so they are comfortable with their using it before you turn them loose.
- 5) Make sure the partner has opened Fidelity and E*Trade accounts, has accessed them, via their password, **our Fidelity.com account website**.
- 6) Make sure the new partner has accessed **E*TRADE.com** for the **Power E*Trade platform** and can access the data from that platform for our **tool #8 spreadsheet**, and the paper account.
- 7) **Review some of our tools** with them: including the Etrade App: Positions Report, graph, Completed Positions, Mike Leck's Portfolio Review Report, and **Tool #8 Put Credit Spread**.
- 8) Make sure the new partner **has entered the correct data** onto a **Tool #8 Put Credit Spread options spreadsheet** from the E*Trade broker/dealer websites. Make sure they are comfortable doing this and that they are doing it correctly.
- 9) Orient the new partner to PI, introduce the new partner to our other partners, and make sure the new partner feels welcome.
- 10) Be a **source of information**, and **make sure you** (the new partner) **attend the Picnic, Holiday Party, and Partner's Education Conference**.
- 11) The new partner is responsible for knowing the **Pacific Investors Fact Sheet and Partnership Agreement**.