



Smart Money Alliance
www.SmartMoneyAlliance.org

BRANCH MANAGER ON-BOARDING

Thank you for enrolling to open a Smart Money Alliance Branch Office. We are excited to collaborate with you in improving the financial literacy of your community while also increasing access to capital.

Jennifer, our Educational Coordinator, will be calling you to review these four steps.

STEP ONE: GET ON-BOARDED

Nearly every Monday, Wednesday, and Friday, we on-board new Branch Managers via Zoom. [Click here](#) to register.

You can attend as frequently as you'd like and this is a great forum to answer questions as we gather ~12 times a month.

STEP TWO: GET CERTIFIED

Without question, your first priority is to complete the Branch Certification Training within the next week.

Access the YouTube overview of training and the curriculum by [clicking here](#).

Once you have finished the on-demand training, you'll schedule a call to set goals (Step Three below).

STEP THREE: GOAL SETTING CALL

Please schedule a one-on-one call so we can set monthly goals. [Click here](#) to schedule.

Smart Money Alliance, a non-profit organization
101 East Broad Street, Suite 200
Mineola, TX 75773
www.SmartMoneyAlliance.org
Support@SmartMoneyAlliance.org
903-200-8781



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STEP FOUR: HOLD YOUR FIRST ACCESS TO CAPITAL WORKSHOP

As you'll learn about in your on-boarding and goal-setting sessions, we want to position you to have your first workshop in your first 30-45 days. Here is how:

1. Get familiar with the workshop structure by [clicking here](#). In fact, there are three workshop scenarios that you can leverage.
2. Identify a host, i.e., church, chamber, co-working space, business organization, etc. and set a tentative date. Submit that information (hosts contact name, full address, proposed date, and your information) on the form located at the bottom of [this page](#).

We'll send a Field Trainer out at no cost to you for the workshop which is an important part of your training.

OPTIONAL: BUILD A TEAM AND EARN AN EXTRA \$5,000 PER WEEK

You can become a Regional Director (no cost) and earn an extra \$5,000 per week with a couple simple steps:

1. Help us identify others who would be a good fit to be a Branch Manager.
2. Invite them to our Prospective Branch Manager Zoom calls held most Tuesdays and Thursdays. Help them [register here](#).
3. Once they pay their Branch License fee, you receive \$5,000.

GETTING YOUR \$25,000 WORKING CAPITAL

Additionally, let's complete a soft pull authorization so we can work on setting up the financing for your full Branch Office license fee which includes the \$25,000 grant available to you. [Click here](#) to do so.

LIVE SUPPORT

For support, please call the Smart Money Alliance office at 903-200-8781 (and join us for the aforementioned trainings).

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Three Financial Literacy Workshop Scenarios

SCENARIO 1.

- **Description:** Help facilitate a one day [Access To Capital Workshop](#).
- **Participant Cost:** Participants pay \$499 per and you earn half.
- **Outcome:** Loan package and capital match.
- **Your income:** With twenty (20) minimum, you'll earn at least \$5,000 upfront plus much more by writing the Key Person Policies on each.

SCENARIO 2.

- **Description:** Help facilitate a one day Workshop for [SBA Express Participants](#).
- **Participant Cost:** Participants pay \$1,999 per and you earn half and complete the normal thirty day program in just one day.
- **Outcome:** Loan package and apply for a SBA 7(a) Express Loan of up to \$150,000 the next day.
- **Your income:** Even with just the minimum of six (6) attendees, you'll earn at least \$6,000 upfront plus much more by writing the Key Person Policies on each AND sharing in the performance fee from their capital raise.

SCENARIO 3.

- **Description:** Teach our [one hour financial literacy topics](#) (available for personal and business financial literacy).
- **Participant Cost:** Participants pay \$20 per and you earn half.
- **Outcome:** Improved business financial literacy.
- **Your income:** Thus, easy \$100 to \$200 per hour.

WHO PROVIDES THE SPACE AND THE AUDIENCE?

In all cases, we work with hosts who provide the space/venue and the audience (through their sphere of influence).

HOW TO GET STARTED?

Get set up as a Branch Manager for only \$250 out of pocket here:

<https://www.smartmoneyalliance.org/contact-us/>



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BRANCH MANAGER CERTIFICATION TRAINING

Let's get you Certified as a Branch Manager with no cost. In fact, with the Workforce Grant that we've received, you'll be trained for free and be positioned to earn an adult income by implementing this knowledge and helping others.

Below, you'll find the curriculum as recorded Zoom webinars with the topic addressed in each webinar. Once you've completed all of these, you can email us, Certification@SmartMoneyAlliance.org, to complete the Practicum and then to take your Certification Exam.

PRIMARY EDUCATIONAL TOPIC	TRAINING LINKS
Smart Money Alliance Overview	https://youtu.be/XIta5H3Hkvl
Four Week Access to Capital Program	https://youtu.be/yFXtAQgIFdU
Conducting Workshops (2)	https://youtu.be/cK-pu-5gnrY AND https://youtu.be/mX6Q4qJIIIA (please watch BOTH)
Regional Director Role	https://youtu.be/8pcvt-guk-0
Understanding The Role of the Branch Manager	https://innovativecapitalstrategies.zoom.us/rec/share/450kN77tzHJOXonm9Gf6apMvAt39T6a813UX-fQNmkeBFAmqbjx55B59SXYHnNBU Password: 1d@Ao9IN
Teaching Financial Literacy	https://innovativecapitalstrategies.zoom.us/rec/share/7MVfcpihqWZlYqPr1UrzZIURNJTmeaa8hycYrPdevB5grx11sKJeUp64Zpk9ssmb Password: 6C&364wF
Understanding Underwriting and SBA Express Program Part 1	https://innovativecapitalstrategies.zoom.us/rec/share/59UplpTy7kplcM-Qwn_2Z7U9ELrJaaa8hHMaqPUOyhrHt3uQpNp3GzmlZBUdQ1xl Password: 6C.w007&
SBA Express Program Part 2	https://innovativecapitalstrategies.zoom.us/rec/share/yN5sN7v80FxFRs_KxhzGc_FwBJ3Meaa82nMfqPAKxEyvTwQ4_4mSqN_1MqPXDSSW Password: 4o!31@I?
Best practice of client onboarding and completing the Personal Financial Analysis	https://innovativecapitalstrategies.zoom.us/rec/share/wY8qkY3ux0dOfYXtq2DRBJ8cOpT7eaa81CQY-KJcmBz-bJz4o0vyJQDDfOJUsyN7 Password: 2i@53\$7p

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