



## Surge365 Business Associate FAQs

### Surge365 Home Office Support

Hours: Monday - Friday 8am - 4:30pm, CST

(618) 655-2431

6 Ginger Creek Village Drive, Glen Carbon, IL 62034

### What does SBA stand for?

SBA stands for Surge365 Business Associate.

### What does an SBA do?

Through our Multi-Level Marketing platform, SBAs use a team-building approach to earn commissions and bonuses by selling The Ultimate Travel Solution: Vortex / Vortex Membership / Vortex Platinum

### How can I join Surge365 as an SBA?

SBAs are recruited and enrolled in Surge365 under the sponsorship of an active SBA (your "Sponsor"). If you do not have a relationship with an active SBA, you may enroll by visiting the Surge365 corporate website ([surge365.com](http://surge365.com)) and choosing the Contact Us tab. You may also email or call the corporate office and you will be contacted to complete your enrollment.

### Who can join as an SBA?

In order to enroll as an SBA, you must be at least 18 years of age and you must provide a valid Social Security Number, FEIN, or the equivalent Tax ID Type for your region. We accept all major credit cards: Visa, Mastercard, Discover, and American Express. All information provided must be valid as we pay commission to our SBAs and will issue a Form 1099 (or region specific form) to SBAs who earn a minimum of \$600 within a calendar year. We are currently open for business in the following countries, with many more to come: Australia, Bahamas, Bermuda, Canada, Costa Rica, Jamaica, Mexico, New Zealand, Panama, Romania, Trinidad & Tobago, United States, and the United Kingdom.

### Is there a fee to enroll as an SBA?

Yes. For \$19.95 per month, an SBA can earn unlimited commissions and bonuses by selling the Ultimate Travel Solution products. Plus, you will receive access to Winners Win Live Training, first 60-Day Success Coach (must select during signup), the Surge365 Mobile App so you can work your SBA business on the go AND you will receive the Taxbot app, which is the ultimate mileage & expense tracker!

### What does the Surge365 Mobile App include?

The Mobile App allows SBAs to send videos to prospects, enroll new members, initiate 3-way opportunity calls, access their Back Office with its wealth of information and training, keep track of leads, view upcoming events, and receive real time corporate alerts. (Mobile App available to iPhone and Android users)

### Why should I use Taxbot?

Taxbot is the ultimate mileage and expense tracker, with the goal to automate your business accounting. Taxbot tracks all of your business driving using your iPhone or Android smartphone's GPS, allowing you to identify and classify your business trips at a later time. Taxbot is one of the only accounting products that focuses on IRS (and CRA) compliance. No more saving receipts - you save yourself and your accountant time by logging your business expenses on the Taxbot app. Visit <https://taxbot.com> to learn more about this valuable business tool.

### Can I speak with a real live person at the Surge365 Home Office?

Absolutely! You have a dedicated Home Office Support Team standing by to assist you. We are available Monday - Friday between 8:00 AM - 4:30 PM, CST by calling (618) 655-2431. You may also submit a Support Ticket 24/7/365 and we will respond during normal business hours. Support Tickets are accessible from your Back Office under Menu.

### How soon after I make a sale will I receive my commission?

SBAs are paid on a weekly and monthly basis. The weekly commission cycle runs Friday through Thursday, with commissions being paid the following Friday. Monthly commissions (residuals) are paid on the 11th of each month for the prior month's activity (see Compensation Plan for full details).



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### What tools are offered to SBAs?

Every SBA is given a unique website URL to use for team building. Example: [www.surge365.com/\(yourending\)](http://www.surge365.com/(yourending)). Along with your own unique marketing website, you also have a Back Office ([my.surge365.com](http://my.surge365.com)), which is the hosting portal for all of your personal account and team information. The Back Office is username and password protected so only you are able to login and change or track your account details.

Other tools available in the Back Office under Menu > Resources include:

**Approved Social Media Images** - SBAs are able to offer exclusive insider pricing to those who enroll as Vortex Member or Vortex Platinum subscribers. These images will allow you to show prospects examples of the savings and benefits of being a Vortex Member or Vortex Platinum.

**Vortex Guide** - In this guide, we'll give you a quick overview of your new venture and provide a strategy for how to better market your Vortex. This is your go-to guide!

**2P&C Sales Process** - Step by step script to help with promoting your business: Prospect - Present - Close

**Surge365 Policies & Procedures** - Before enrolling in Surge365, every new SBA must agree to the P&Ps, which are included during the enrollment process.

**Compensation Plan** - Surge365 has a compensation plan like no other in this industry. The "Comp Plan" provides detailed information on getting started, the different travel products and their cost, your direct sales commissions, builder generations, builder bonuses, the 100% Match, and the Surge365 Director program which offers many executive perks.

**International How To** - Surge365 is proudly expanding to many countries throughout the world. This guide will help you expand your clientele beyond the United States.

**Presentations** - There are two (2) different versions of PowerPoint to help you present to a prospect. One version requires internet access while the other does not. It can't get much better than that!

**Spanish Materials** - Many of these documents and the presentations are also available in Spanish.

### What does it mean to be QTO?

QTO stands for Qualified to Override. Having a minimum of three (3) personally sponsored Vortex, Vortex Membership or Vortex Platinum subscribers will make you QTO. You must be QTO to earn Team Builder Commissions, Bonuses and the 100% Match. (Promotion to Team Builder, commissions, bonuses and the 100% Match are explained further in the Compensation Plan.)

### What is the 3 and Free Club?

As an SBA you can share the benefit of the 3 and Free Club with your Vortex, Vortex Membership, and Vortex Platinum subscribers. They can join the 3 and Free Club by referring a minimum of three (3) subscribers paying the \$59.95 monthly fee. When they personally refer at least three (3) subscribers, their monthly travel subscription fee will be waived. Should one of those three (3) miss a payment, the Vortex Owner will automatically be charged the monthly travel subscription fee. All 3 and free club members should make sure their referrals continue to be active subscribers. There is no time limit to achieve 3 & Free Club membership.

### Fast Start to Team Builder

You have 30 days to achieve Team Builder status with 6 personal points. A Vortex sale counts as one (1) point. A Vortex Membership sale counts as one (1) point. A Vortex Platinum sale counts as two (2) points.

### Team Builder

After 30 days, an SBA needs a total of fourteen (14) points to earn Team Builder status (six [6] points must be personal). There is no time limit to achieve Team Builder status.

### \$150 Fast Start Bonus

You will receive a \$150 Fast Start Bonus when you personally make a total of three (3) sales of any product (\$199, \$299, or \$499) in your first 8 days as an SBA. Sales may count toward both the \$150 FSB and \$1,000 FSB. Sales cannot count toward \$1K Team Builder Bonus if counted toward either of the Fast Start Bonuses.



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### **\$1,000 Fast Start Bonus**

You will receive a \$1,000 Fast Start Bonus when you personally make a total of fourteen (14) points in sales in your first 30 days as an SBA. A Vortex sale counts as one (1) point. A Vortex Membership sale counts as one (1) point. A Vortex Platinum sale counts as two (2) points. Your next sale will start your count toward the \$1,000 Team builder Bonus .

### **Where can I find information on compensation I should expect to earn as an SBA?**

The amount of compensation you earn is solely based on how much effort you put into your business. We furnish you with all the tools and support required to build a successful business. SBAs are provided with an up-to-date Income Disclosure Statement which outlines the estimated earnings for our organization. The IDS is located in your Back Office > Menu > Resources > SBA Documents.

### **Take on the \$50K Challenge!**

Upon enrollment, you have 100 days to achieve 100 sales in your Team Builder Group and qualify for the \$50K Challenge. To view the \$50K Challenge details posted on the Wavebreak blog, visit: <http://bit.ly/50KS365>

### **Where can I track my earnings, promotional progress, and downline details?**

We make it very easy for you to know exactly where you stand in your marketing position. Under the Menu item in your Back Office is where you will find links to your Resources, Earnings, Progress Reports, and Team information. This important information is available to you 24/7 through your Back Office.

### **Where can I order marketing materials?**

We have partnered with Vistaprint to provide you with beautifully designed business cards with the Surge365 and Vortex logos. Order logo apparel, banners, promotional gifts, and more. Click on the Apparel & Tools ad in your Back Office to see all the marketing materials available.

### **What is the Winners Win Live Training?**

Winners Win LIVE Training is a weekly Saturday morning training that is available to ALL SBAs. You will receive incredible business training from Surge365 Co-Founder Coach Tomer, sharing his years of marketing experience, in addition to the expertise of master trainer Surge365 Co-Founder & President Chris Cokley, and Surge365 Co-Founder & CEO Scott Tomer. There is no additional cost to access the Winners Win Live Trainings. Weekly trainings are archived until the next LIVE training.

### **Does Surge365 have a Facebook page?**

Of course! We're on Facebook, Twitter, Youtube, and the Surge365 blog site - Wavebreak. Check us out at:

Like us on Facebook - @Surge365

Follow us on Twitter - @Surge365

Follow us on Instagram - @surge\_365

Subscribe to our YouTube Channel - Surge365Media

Check out the Wavebreak Blog - [wavebreak.surge365.com](http://wavebreak.surge365.com)

### **How often will I receive communication from the Home Office?**

We value our SBAs and not only do we want to hear from you, we want you to hear from us. Most communications will be sent to you by email on an as-needed basis. Emails vary depending on special promotions, upcoming events, or exciting news we want to share. Please make sure your email address is correct on your account so you don't miss important communications. You may also want to add [noreply@tx.surge365.com](mailto:noreply@tx.surge365.com) to your email contact list to ensure emails sent from the corporate office reach your inbox. Much of this information is also archived on our blog [wavebreak.surge365.com](http://wavebreak.surge365.com). If you have taken advantage of the S365 Mobile App, you will also receive communications there - breaking news, new podcast and video alerts, etc. We want you to be fully informed of all that is going on in Surge365. Be sure to have your Surge365 Mobile App notifications turned on.





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### **How do I update my personal and payment information?**

Click the Tools icon (gears) located in the upper right corner of your Back Office and select Personal Information to edit your address, telephone number, email address and password. Select Subscriptions to update the method of payment you wish to use for your monthly subscriptions. Website Personalization also allows you to choose the name you want displayed on your site. If you have a nickname you're better known by, you may add it here. Your commission checks will still be made payable to your legal name; however your preferred name will display for your customers to see. You can also choose whether or not to have your email and telephone number displayed on the website. We encourage having both options so prospects are able to contact you.

### **Where can I find my overall earnings and expenses?**

Also under the Tools icon you will find Order History, which displays everything you've paid us, and Commission History, which is everything we've paid out to you. Along with using Taxbot, this is a great go-to spot to easily produce your numbers at tax time.

### **Who is in my upline and where can I find their contact information?**

Every SBA is enrolled under a Sponsor. Along with having a Sponsor, you will also have access to your complete upline. In the upper right section of your Back Office, there are icons for Sponsor, Team Builder, Regional Builder, National Builder and Marketing Director. Click the icon and you will be provided with their name, telephone number and email address. Feel free to contact your upline with questions about your business, team building tips, meetings in your area, etc. They are here to support you!

### **What is the cancellation/refund policy?**

While we know you are going to love being a part of Surge365, we also understand circumstances arise where one may need to cancel their subscription. You may cancel at any time by emailing [cancellations@surge365.com](mailto:cancellations@surge365.com) or by submitting a Support Ticket from your Back Office. We offer a five (5) business day refund guarantee on all monthly subscriptions.