Please print out this checklist and complete it **before** you begin your online form. This checklist has all the information you will be asked to provide during your submission. Simply print this form and use it around your office to capture any required information so you can quickly input the data online OR upload your completed checklist and skip filling out the online form!

Rep Firm Name:

Core Requirements (Must have all 10 to qualify for MTC)		
MTC Requirement	**Applicable to your firm?**	**If yes, fill in the requirement details.** List any important details here: brand, company, example. model, program, service provider, etc.
Smartphones	Yes ☐ or No ☐	
Color Laser Printer Duplex Capability with Scanner	Yes ☐ or No ☐	
Website	Yes ☐ or No ☐	http://www.
Laptop or Tablet	Yes ☐ or No ☐	
Email: Company/Domain Specific Email Address	Yes ☐ or No ☐	@
High-Speed Internet at all Offices	Yes ☐ or No ☐	
Office Suite Software	Yes ☐ or No ☐	
Appointment/Scheduling Software	Yes ☐ or No ☐	
Quoting Software	Yes ☐ or No ☐	
Accounting Software/ Outsourced Accounting Services	Yes ☐ or No ☐	
You must have all Core requirements to be eligible for the Core level. If you do not meet all 10 Core requirements, please email info@mafsi.org for assistance.	**MTC Requirement Score:**	/10

Additional Requirements (9 Advanced, 12 Expert, 15+ Master *Needed for Master level)		
Active Social Media Presence	Yes ☐ or No ☐	• Twitter: @ • Facebook: • LinkedIn: • How many posts per week?: • How many posts per month?:
Backup & Recovery	Yes ☐ or No ☐	
CAD Software	Yes ☐ or No ☐	
Cloud Based, Mobile Access	Yes ☐ or No ☐	
Conference Call Capabilities	Yes ☐ or No ☐	
Data Security – Router/Protecting Internal or Servers/Virus Protection	Yes ☐ or No ☐	
Digital Fax	Yes ☐ or No ☐	
Digital File Storage/Sharing	Yes ☐ or No ☐	
Electronic Commission Reconciliation*	Yes ☐ or No ☐	
Email Campaign Capabilities	Yes ☐ or No ☐	
Expense Reimbursement Software	Yes ☐ or No ☐	
IT Specialist or Outsourced IT Services	Yes ☐ or No ☐	

MAFSI technology training per year (conference or webinar, 3+ hours)	Yes ☐ or No ☐	
Monthly monitoring for updates, computer clean up and compliance of company computer policies	Yes ☐ or No ☐	
OCR Software	Yes ☐ or No ☐	
On-going training for Outlook & Smartphones & other software programs	Yes ☐ or No ☐	
Paperless Office	Yes ☐ or No ☐	
PDF Editing Abilities	Yes ☐ or No ☐	
Photo & Video Editing Software	Yes ☐ or No ☐	
Plotter/Large Format Printer	Yes ☐ or No ☐	
SpecPath®	Yes ☐ or No ☐	
Video Conferencing*	Yes ☐ or No ☐	
Virtual Reality Software	Yes ☐ or No ☐	
Webinar/Seminar Hosting	Yes ☐ or No ☐	
Advanced Website	Yes ☐ or No ☐	This is a multipart question: Each part counts as .5 of a requirement. The max requirements you can earn here are 2.

- Interactive: Yes ☐ or No ☐
- Contact Forms/Lead Capturing Capabilities: Yes ☐ or No ☐
- Line List with links: Yes ☐ or No ☐
- Mobile Friendly/Responsive Website: Yes ☐ or No ☐

MAFSI Survey Participation 50%	Yes ☐ or No ☐	MAFSI will confirm your firm's participation in the quarterly Business Barometer, Market Forecast and/or Benchmarking Survey.
MAFSI Survey Participation 100%*	Yes ☐ or No ☐	MAFSI will confirm your firm's participation in the quarterly Business Barometer, Market Forecast and/or Benchmarking Survey.
Rep Agency Management Software	Yes ☐ or No ☐	This is a multipart question: Each part counts as .5 of a requirement. If you have all 5, it will count as 3 requirements).

- Customer Relationship Management Software (CRM): Yes ☐ or No ☐
- Contact Management Software: Yes ☐ or No ☐
- Opportunity Tracking Software*: Yes ☐ or No ☐
- Forecasting Sales Software*: Yes ☐ or No ☐
- Sales Activity/History Software: Yes ☐ or No ☐

- CRM:
- Contact Management:
- Opportunity Tracking*:
- Forecasting Sales *:
- Sales Activity/History:

MTC Additional Requirement Scoring **Core:** 1-8 **Advanced:** 9-11 **Expert:** 12+ **Master:** 15+ **All*** (You must have all requirements marked * to be eligible for the Master level. If you have 15+ requirements and do not have the *requirements, you will be at the Expert level.)	**MTC Additional Requirement Score:** / 31

This checklist has all the information you will be asked to provide during your online MTC submission. Reference this list so you can quickly input the data online OR upload your completed checklist and skip filling out the online form!