

Weekly Rep Call

Click [HERE](#) to listen to a recording of this week's rep call.

Call Notes (Click on the red links to learn more):

Compliance/Administration

Compliance Topics

- Updating personal information
 - Cambridge requires advisors to [keep you U4 current](#) by reporting any changes to Cambridge within one business day. Don't forget that these changes will also need to be made to your marketing material. Once the marketing material is updated make sure it is approved through adview.
 - Adview is used by rep-advisors and administrative staff to submit client communications to compliance
 - All advertising must be submitted to [Adview](#) prior to its first use
 - This includes financial planning and consulting services when used with more than one client
 - Additional information is available in the [Communication With the Public manual](#)

Practice Management

Riskalyze

- Last month saw the largest decline in the DOW in over 2 years. Interest rates are also on the rise. The questions advisors are facing are: "what is going on with my portfolio?" and "am I going to be okay?".
 - Advisors using [Riskalyze](#) have been able to successfully set client expectations around market volatility and interest rate rises using the Risk Number. **Mitch Dunn**, Advisor Solutions Manager with Riskalyze covered some of the basics on how advisors are experiencing success in this now volatile market
- Pricing
 - Cambridge has a discounted price that is available for review [HERE](#)
 - Our reps currently have an option to pilot the service for three months instead of the full year which is normally required. This allows you to see if is a good fit for your practice.
- Contact Mitch Dunn for additional information
 - Phone: 530-725-5121
 - Email: mdunn@riskalyze.com

Annual Meeting

Event Details

- This year's meeting will be May 9th - 11th
- The meeting will be at the [Reunion Resort](#) in Orlando

Preliminary Agenda

- The preliminary agenda has been completed. To review the agenda click [HERE](#)

Registration Information

- Rooms are **almost sold out**. We have exceeded the number of rooms that we thought we would need but were able to get **10 more**. These will not last long, so if you are interested in going to the annual meeting please book [HERE](#) today.
- Register for the event [HERE](#)

Regards,
Larry L. Qvistgaard
President
Duncan Advisor Resources

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