

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 and Administration Updates

Compliance Topics

- Consumer Report Authorization Required for both Registered and Non-registered Individuals
 - Cambridge is now requiring all non-registered personnel to complete a [Consumer Report Authorization \(CRA\) form](#).
 - They will be receiving this form via DocuSign to their Cambridge email.
 - If they do not have a Cambridge email, the email will be sent to their branch manager.
- FINRA implements [New SIE Exam Requirements](#) beginning October 1
 - The new process will consist of completing the [SIE exam](#) and then the appropriate "Top off" exam.
 - Several exams are being retired
 - The following exams are not currently changing FINRA Series 4,24,26,51,53,63,65,66
 - Advisors with a current FINRA Series 6, 7, or 99 as of the October 1 effective date will be grandfathered and considered to have passed the SIE exam
 - Additional information is available [HERE](#)

Practice Management

This week we had a deep discussion about the why behind Marketing.

- We revisited many of the topics we have covered on past calls.
- Talked about static vs dynamic marketing material
- Discussed what might be holding you back from getting started with your digital presence

In the coming weeks, leading up to Ignite, we will have several webinars talking about your digital presence.

- There will be advanced notice so that you can be in front of a computer or tablet if you want to participate live.
- These will also be recorded in case you miss the live webinar.
- We will keep the webinars to the normal thirty minutes.

**Larry L. Qvistgaard
President
Duncan Advisor Resources**

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