

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

- As a reminder the **CMAP to WealthPort** Account Conversions Timeline is available [HERE](#)
 - If you have not already done so, please submit your spreadsheet to your OSJ **Today**.
2017 correspondence submissions
- An email will be sent out if you have any outstanding [correspondence](#) submissions from 2017. Please follow the [instructions](#) in the email to complete these

Trade Review

- When uploading documents to webcapture make sure that they are legible.
- eSignature is a good way to make sure your documents are legible because they are always in a digital format

Available Training's

- [Admin to Admin Call](#): CIR Statements
- eSignature (course code in knowledge center **ESIG**)

Practice Management

Today we will come full circle and take a deeper dive into a topic we've discussed numerous times: "Documentation and Communication". To help us on the call, I've asked **David Mehlhorn** from [Redtail Technologies](#) and **Jim Silvers** from Cambridge, to join us. If you plan on building and preserving value in your advisory business, you won't want to miss this call!

During our call they covered:

- "What" "Why" "When" and "How" on CRMs.
- How CRM systems can integrate with the systems that you already use at Cambridge

Regards,
Larry L. Qvistgaard
President
Duncan Advisor Resources

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