Duncan ADVISOR RESOURCES

Making It All Work **Together**

Weekly Rep Call

Click HERE to **watch** a recording of this week's webinar.

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

Compliance and Administration Updates

Compliance Topics

2018 Firm CE and Annual Compliance Questionnaire

- Additional information about taking the required Firm CE
- Take the 2018 firm element classes in the knowledge center
- Take the annual compliance questionnaire by clicking HERE

If you Attended the DAR annual meeting, you could have a maximum of 50% of your Firm CE completed.

- Follow the instructions HERE to see what you have completed
- The sessions where credit was available are marked with the letters "FE" after the name of the presentation on the DAR 2018 event agenda
- If you are missing credit for a class or for the annual compliance meeting please reply to this email and let us know.

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.
- These emails are scheduled to go out the week of October the 8th.

Practice Management

Guest Presenter: **Mark Thornton** Director, Fiduciary Services at Cambridge

For this week's rep call, we had a webinar, where Mark Thornton from Fiduciary Services at Cambridge introduced a **no cost** marketing tool available to all Cambridge advisors.

Referral Edge is a phenomenal way to find HNW prospects and 401K plans right in your backyard. Mark covered how to sign up for access, basic navigation, and how to get additional information and training.

- To get instant access to **Referral Edge** click HERE
- Once on the web page click on "Register Now"
- The security code needed is **NFS-CFE**

Be there, make Q4 your best yet!

Larry L. Qvistgaard
President
Duncan Advisor Resources

Duncan Financial Group
311 Main Street
Irw in, PA 15642