Duncan
ADVISOR RESOURCES

Making It All Work **Together**

Weekly Rep Call - Recording

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
- Updated Variable annuity disclosure form
    - The previous version was updated on 10/26/2016
    - The latest 1/12/2017 version is simply correcting a misprint
    - Always use the newest forms, but the 10/26 version will still be accepted
- Make sure to stay consistent across all accounts for the same client
    - Some examples of items that should stay consistent across all of a clients accounts include
    - Net Investable assets
    - New worth
    - Risk disclosures
- Net Investable Assets vs Net Worth
- Can you be a trustee on an OBA?
    - Maybe
    - If this comes up in your practice contact your OSJ

Practice Management
- Its time to sharpen your Tools
    How can we improve and grow our business
        - Consider attending one of the Cambridge conferences
        - Retirement Income Forum
        - Retierment plan summit
        - RPM coaching program
        - RPM workshop
        - Women Advisor Forum
        The full Conference Calendar is here
    Pershing Insite 2017
- Taking the series 65/66
    - Information on ExamFX
    - Click here to access the ExamFX Cambridge portal
        For manager email address use: larrq@cambridgesecure.com
- Information on Riskalyze

- You should have received an invitation to the Annual meeting at your official Cambridge email address earlier this week. If you have not yet received this invite please let me know.

Branch Meeting

CLICK HERE TO REGISTER

This is the same location as the 2016 meeting
The dates are from May 3rd - 5th

**Please note that the capability has been enabled to listen to these recordings on a cell phone or tablet. Please let us know if you run into any difficulties.

*Recordings will only be available for two weeks after the date of the call.

Best Regards,

Larry L. Qvistgaard
President
Duncan Advisor Resources

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