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
- Cyber Security
  - Third-party Wire Fraud
  - Cybersecurity best practices
  - Identifying and Protecting Against Phishing Attacks
- Wealthscape is adding Two-factor Authentication in March
- At anytime a regulator could come by your office for an unannounced audit so be prepared.

Practice Management
Due to technical difficulties, the PowerPoint portion of the presentation was not able to be recorded. In its place, please click HERE to download the PDF copy of it. The voice recording was recorded.

- Duncan Academy hosted a presentation where you can learn about options available for your clients with Care Solutions -- a portfolio of asset-based LTC products that can provide tax advantages and benefits, even if care is never needed.

During this webinar you will learn:

- How certain annuities can benefit from the Pension Protection Act and provide income tax free withdrawals for LTC
- About products that issue all the way up to age 85
- How to use qualified money to gain long-term care benefits
- How to speak with your clients about a negative topic (LTC) in a positive way

This learning opportunity will give you the 'nuts and bolts' of OneAmerica products and arm you with the knowledge you need to succeed. At the same time, you will gain a level of comfort and learn how to broach this challenging topic with your clients.

Additional information mentioned during the call:
  - Five unique Traits
  - AC vs UL
  - Client Profile

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,

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