

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

Wanna Cry Ransomware

Make sure to be diligent when reading and reviewing email

- Don't open an attachment or link you did not ask for or expect
- Remember: "When in doubt, throw it out!"

If your computer does become infected

- Immediately remove the internet connection
- Contact Cambridge's Information Security Team at security@cir2.com

Link

- Cambridge email about [Wanna Cry](#)
- Cambridge's [Cybersecurity Resources](#)

Phishing DocuSign Emails

- DocuSign was hacked and the hackers are sending fake emails to known DocuSign clients
- Always be cautious of emails with attachments or links that you did not request or are in reference to something you do not expect
- Link

Cambridge email about [DocuSign](#)

Client Email Address Change

- Clients who have added or updated an email address in CLIC are now required to validate their identity when electronically signing a document. This verification is conducted using RSA ID Check

- Link

Additional information is [here](#)

Switching Investments and Annuity Redemption Policy Switching

- When an investment is switched within six years of the original investment purchase date, and the switch results in potential additional sales charges for the client (whether up-front, back-end, or a new contingent deferred sales charge schedule), Cambridge requires the client to sign an Investment Exchange Disclosure Form acknowledging an understanding of the consequences of the switch.

Annuity Redemptions

- The Investment Exchange Disclosure is required in a

situation where a rep-advisor is liquidating a client's annuity with the intent to transfer the proceeds to a commissionable or advisory account.

Links

- Cambridge Alert on [switching and annuity redemption](#)
- [Investment Exchange Disclosure Form](#)

Practice Management

Sharespost (2017 Annual Meeting Presenter)

- Matt Koerick, Regional Vice President with Sharespost speaks about the SharesPost 100 Fund, which is a closed-end interval fund that invests in late-stage, venture-backed, private growth companies.

Contact Information

Matt Koerick
Regional Vice President, Mid-Atlantic
SharesPost 100 Fund
610-999-6931 cell

Links

- Information about the fund is [HERE](#)
- [Sharespost Brochure](#)
- To contact the wholesaler for your region, please refer to the attached [Wholesaler Map](#)

Best Regards,
Larry L. Qvistgaard
President
Duncan Advisor Resources

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