

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

Paperwork and Forms

Net Investable Assets

- What is considered by Cambridge to be net investable assets can be found [here](#)
- Real estate held for investment purposes should be included in your net investable asset totals
- Make sure to keep the clients holdings consistent across all forms

Education and Events

[Cambridge Roadshows](#)

- Cambridge will be hosting several live events, this June in cities across the country
- During these events the main topic of conversation will be the **DOL fiduciary rule**

[Ignite 2017](#)

- Registration is currently open for Ignite 2017
- This year's event will take place in Dallas, Texas from September 13-15

Practice Management

Great West Financial - Bryan McInerney

- Bryan McInerney, Regional Sales Director with Great-West Financial will discuss how advisors are using their restricted beneficiary designation form to prolong their client's legacies along with protecting the advisor's assets under management.
- Contact information: [Wholesaler Map](#)

Cambridge Source Marketing

- [Cambridge Source](#) is the marketing group within Cambridge.
- They offer a one-on-one consultation meeting in which they discuss any marketing needs that you have
- Based on your needs they will let you know what services are available to you through their group

Best Regards,
Larry L. Qvistgaard

President
Duncan Advisor Resources

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Duncan Financial Group
311 Main Street
Irwin, PA 15642