

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

Trade Review

- Some best practices for getting trades review quickly
 - Submit complete and accurately paperwork
 - Check trade review at least two times every day
- Trades can come back to you unexpectedly so even though you have not submitted new business check trade review daily

Best interest analysis Form

- [Best interest analysis form](#) is available to use now
- This form will be required on January 1, 2018 and will eventually [replace the IRA Rollover Disclosure](#) form
- Once this form is submitted nothing can be updated on the form without getting the client to initial the change. So be extra careful when completing this form

Compensation Agreements

- A new compensation agreements will need to be resubmitted to Cambridge
 - The compensation agreement form has changed with the implementation of the DOL.
 - The new agreement will be sent to you in the coming weeks and will mirror the compensation you currently receive (No changes to compensation)

Practice Management

Joel Bennett, VP, Business Strategy with [EQIS](#) covered a new [income model](#) and a new [distribution strategy](#).

- Contact Information
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Summer Vacation

- With Summer here many of you will be taking a vacation or might be out of the office for several days in a row. When you are out of the office make sure the following items are covered
 - Email should have an automatic reply

- Voice mail should state that you will be out of the office
- Make sure your OSJ is aware that you will be out of the office
- Each of these items should convey
 - How long you will be gone
 - If and when you will be able to return their call/email prior to returning
 - And where else they can go for an urgent matter

Best Regards,
Larry L. Qvistgaard
President
Duncan Advisor Resources

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