

## Weekly Rep Call

Click [HERE](#) to listen to a recording of this week's rep call.

Call Notes (Click on the [red links](#) to learn more):

### **Compliance and Administration Updates**

#### **Compliance Topics**

##### **Annual Compliance Questionnaire**

- The 2018 [Annual Compliance Questionnaire](#) is now available. The questionnaire is due November 15, 2018.
- To save your answers and return to the questionnaire later, use "Save as Draft."

##### **Proposals (Hypotheticals/illustrations)**

- Proposals can be considered Correspondence or Advertising
- When using a proposal with only one person, it is considered correspondence
- Proposals used with more than one person are considered advertising and must be advised approved before use with the second person.
- Once advised has approved a proposal you no longer need to submit it through correspondence
  - You will need to keep a record of who received the proposal
  - When sending to more than one person at a time a correspondence submission is required.

### **Practice Management**

#### **Best Practices**

##### **Cambridge Nation**

- Cambridge Nation is Cambridge's discussion board. Additional information is available [HERE](#)
- Access to Cambridge Nation is [HERE](#)

##### **Advisor Resources**

- During this week's call, we had a fantastic discussion about the multitude of resources available to all of the reps in our branch. We also discussed the "bench strength" that each of you have behind you. This support and backup are always there if needed. Even though you may be a solo practitioner you are not alone.
- There were a lot of great ideas shared about positioning yourself and your practice when speaking to prospects.
- A special thanks to those who shared their ideas and best practices.

**Larry L. Qvistgaard  
President  
Duncan Advisor Resources**

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