

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

Wealthport Wrap

- [Timeline](#) for wealthport wrap
- WealthPort Wrap Advisor-directed Account Conversion
 - Conversions scheduled every two weeks beginning June 12, 2017 thru October 31, 2017
 - Cambridge will send a client letter 30 days prior to the conversion
 - Advisors need to provide the client the WealthPort Wrap Brochure
- Instructions on how to convert to the level fee Wealthport Wrap Advisor-directed program are [HERE](#)
- Additional information on [WealthPort Wrap](#)

Practice Management

Dawn Impellizzeri, Senior Vice President, with [Griffin Capital Securities](#)

- Adding the combination of both private and public real estate can help preserve wealth, lower volatility, reduce correlation, hedge against inflation and improve the risk adjusted returns for your clients' portfolios in, near and during retirement.
- The Griffin Institutional Access Real Estate Fund is a diversified actively managed portfolio of Private and Public Real Estate that provides individual investors the opportunity to invest in real estate the same way that an institution does with structural nuances that serve to reduce risks and improves returns
- Links
 - Morningstar [Performance Report](#)
 - [Institutional Real Estate](#)
 - [Access Flyer](#)

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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