

## 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**

Training Available at Cambridge

- New Fee Billing [Training](#)
  - Cambridge has added a new fee billing training to help reps become familiar with the fee billing system in CLIC
- CIR Statements [weekly training](#)
  - CIR Statements are available, at no cost to you if you have clients in Wealthport
  - To sign up for access please [click here](#)
- If you are considering hiring a new employee you can utilize [HR services](#) available to you through Cambridge.

### **Practice Management**

#### **Client Solutions at Cambridge**

Matt Vickers, AVP with Client Solutions at Cambridge joined us for this week's Rep Call! Matt gave us an overview of the Client Solutions Team and how to best utilize their 150+ years of combined experience. Matt also give us real-life examples of how that team has helped your fellow advisors win clients and close cases. Another call you do not want to miss!

- Additional information on the Client Solutions Team is available [HERE](#)
- Members of the team mentioned on the call
  1. Troy Bender (ext. 1970) - Advanced Markets
  2. Nicole Hinman (ext. 1395) - Retirement Plans
  3. Matt Vickers (ext. 1967) - Financial and Investment Planning

### **Don't forget to register for Ignite 2018 in Indianapolis!**

Our exclusive Branch Dinner with be Thursday night October 18th at St. Elmo's. You won't want to miss it!

### **Vacation!**

I will be out of the office from 8/24-9/3. If you need any assistance during this time please contact one of your OSJ designees. Their contact information is available [HERE](#)

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

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