

## 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

#### **CMAP to Wealthport Wrap Conversion**

- The **deadline** for submitting your [CMAP advisor](#) directed spreadsheets in good order is **Friday September 8, 2017**
- Instructions to take part in the advisor-directed account conversion are available on the [Cambridge website](#)
- We discussed on the call which type of accounts need your attention and what action needs to be taken

#### **Compliance topics**

##### [Prefix Changes](#)

- In September the following prefixes will be changed from client paid ticket charges to advisor paid ticked charges.
  - Pershing: Q4P, JJD
  - Fidelity: AHU, CQ4, EHU, AY3, AXR
- The new prefixes for client-paid ticket charges are:
  - Pershing: ABV
  - Fidelity: EQ3

##### [Email Encryption Reminder](#)

- While the cost of smarshEncrypt is included in the CLIC Core Services monthly packaged price, encryption is not automatically enabled and must be specifically requested. If your email is not already encryption-enabled, or to verify existing smarshEncrypt capabilities, please contact the Compliance Surveillance Team ([surveillance@cir2.com](mailto:surveillance@cir2.com)).
- To send a secure email use the words "[encrypt](#)" or "[secure](#)" as the trigger word into the subject line of any message which should be encrypted
- Messages with "[sensitive](#)" as the subject line trigger word will be sent via the original smarshEncrypt interface, which requires the recipient to log in and retrieve the message.

### Practice Management

#### **How to differentiate yourself in a commoditized world!**

- Make sure your clients know all of the services that you can provide to your clients
- A professional one page sheet listing all of the services that you can offer is a valuable tool.

- If your clients don't know that you can provide them the services that they need then your client could get a service that you offer from someone else.

### **Ignite 2017**

- [Ignite](#) is coming up September 13th- 15th
- The agenda for Ignite is available [here](#)
- We are having our branch dinner Thursday night, everyone who is attending Ignite should have received a save the date reminder.

### **RPM (Real Practice Management)**

- RPM combines one-on-one coaching with interactive quarterly group meetings alongside your peers to enhance your existing skills
- To apply for the coaching program or if you have questions, please contact the Practice Management Team at [practicemanagement@cir2.com](mailto:practicemanagement@cir2.com)
- Please let us know if you will be signing up for RPM

Best Regards,  
**Larry L. Qvistgaard**  
President  
Duncan Advisor Resources

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