

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

2018 Firm CE and Annual Compliance Questionnaire

- Additional information about taking the required [Firm CE](#)
- Take the 2018 firm element classes in the [knowledge center](#)
- Take the annual compliance questionnaire by clicking [HERE](#)

If you Attended the DAR annual meeting, you could have a maximum of 50% of your Firm CE completed.

- Follow the instructions [HERE](#) to see what you have completed
- The sessions where credit was available are marked with the letters "FE" after the name of the presentation on the DAR 2018 [event agenda](#)
- If you are missing credit for a class or for the annual compliance meeting please reply to this email and let us know.

Practice Management

Creating your DBA

-This week we were joined by Cari Anderson, Strategic Business Coach at Cambridge. During the call Cari talked about the steps involved in setting up your DBA and creating a synergistic message across all marketing platforms.

Specifically she spoke about:

- Short history of DBAs at Cambridge
- Value Propositions and core values
- Mission Statement
- Building a Brand
- Consistency in your marketing message
- Selecting a DBA name and logo
 - Strategies to develop a DBA name/logo
 - [99 Designs](#)
- Consultations Available
 - Practice Management consultations
 - Technology and social media consultations
 - Road map to revenue

- Contact Information

- [Cambridge Source](#)

- Cari Anderson, Strategic Business Coach

Email: cari.anderson@cir2.com

Phone: 641-472-5100

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

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

Larry L. Qvistgaard

President

Duncan Advisor Resources

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Duncan Financial Group
311 Main Street
Irwin, PA 15642