

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

- Advisor-directed account conversion to Wealthport Wrap deadline has been **delayed**.
- Please review the updated conversion timeline available [HERE](#)

Disaster Recovery Plan

Our thoughts and prayers go out to all of those who were impacted by Hurricane Harvey and also who have been and might be impacted by Hurricane Irma.

- If you do not have a disaster recovery plan please review this information on a [Disaster Recovery Plan](#) and this [sample Disaster Recovery Plan](#)
- At a minimum make sure to stay in contact with your clients and assure them that their information is safe and how they can access anything that they need.
- This might be a great time to revisit moving all of your business to a paperless office
 - For information on how to make this move please reply to this email and let us know that you are interested in moving to the cloud (paperless office)

Practice Management

Duncan Walsh Advisors

- A new proposal request form is being developed and will be available once approved by Cambridge
- Please begin sending all proposal requests to the following email address: dwaproposals@duncanar.com
- Latest performance of the DWA portfolios
 - [Performance Summary](#)
 - [Portfolio Sheets](#)
- For information about the branch directed program please contact:
Thomas Walsh
Phone: 513.624.6618
Email: tjwalsh@walshassetmgt.com
Fax: 513.271.8888

Ignite 2017

- [Ignite](#) is coming up Next week, September 13th-15th
- The agenda for Ignite is available [here](#)

- If you don't already have the app, the Cambridge app will allow you to access all of the material for Ignite
- The app is available for Android and Apple phones
 - [Android Cambridge App](#) with access to Ignite material
 - [Apple Cambridge App](#) with access to Ignite material

eMoney

- eMoney has confirmed that they will absolutely set up a webinar training for just our group.
- We will have more information about this training following Ignite.
- As a Cambridge rep are able to get a **discount** off of the full price of their services.

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

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