

## 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**

##### Best Interest Analysis Form

##### Best Interest Analysis (BIA)

- The [Best Interest Analysis](#) (BIA) has been updated to include the Investment Exchange Disclosure requirements and removed reference to the U.S. Department of Labor (DOL) fiduciary rule
- This will be a required form replacing the IRA Rollover Disclosure (IRARD).
- The form became available 1/2/2019
- We will continue to accept the older version of the BIA or the IRA Rollover Disclosure with an Investment Exchange Disclosure until 2/2/2019.
- More information is available [HERE](#)

##### Adview

- All advertising should be approved through [Adview](#)
- If approving material for more than one advisor, make sure to list all applicable advisors rep codes or branch codes.
- Adview approved material should be reviewed by adview ever two to three years.

### **Practice Management**

Guest Speakers: [Case Eichenberger](#), Senior Client Portfolio Manager and [Myles Bozinovski](#), Regional Vice President of Sales with [CLS Investments](#). During the call they gave a high-level overview of CLS Investments and FTJ FundChoice. They then took a deeper dive into the American Funds managed portfolios.

- [CLS Regional Contact Sheet](#)
- [American Funds Solutions Brochure](#)
- [American Funds Newsletter](#)

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