

## 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**

##### Account Forms

##### Recommended Strategies Form

- No longer a required form
- You are required to document this in your CRM/Client notes
- Examples of when this should be documented are available [HERE](#)

##### 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) in January 2019.
- More information is available [HERE](#)

### **Practice Management**

This week we had a **detailed discussion** about the **updated Rep Agreement**. Everyone should have now received this agreement. If you have not yet received this agreement please let us know.

- The relationship agreement will come from Cambridge as a DocuSign email
- Please read this document thoroughly
- If you have any questions related to the agreement, please reply to this email with those questions
- Additional discussions about this agreement are taking place on Cambridge Nation
- You can register for Cambridge Nation [HERE](#)

### **Upcoming Calls**

We will not have a rep call on 12/26/18 or 1/2/19. We will return to our normal call schedule on 1/9/19.

Thank you for a wonderful year! We hope you have a safe and fantastic holiday!

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

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