

Weekly Rep Call

Click [HERE](#) to listen 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](#)

Paperwork Status Monitor Progress Bar

- Paperwork Status Monitor's [new progress bar](#) provides virtually real-time paperwork status updates while facilitating increased transparency
- If an upload is required make sure the PWS item is under the action required tab not the open tab.

Blottering of transactions within CLIC

- Effective October 12, [manual blottering of transactions](#) within CLIC is no longer required
- These transactions could include purchases, redemptions, reallocations and exchanges

Practice Management

Ignite 2018

- During this week's rep call we had a great recap of the high points from Ignite including:

- Discussed the levels within Cambridge

- Solo

- Ensemble

- Enterprise Ensemble

- Multi Advisor Team

- Enterprise

- The expanding availability of Cambridge Source

- The new rep agreement will be coming out prior to the end of the year.

- This agreement will recognize that DBAs do exist.

- Everyone will need to complete the new Rep agreement

- CLIC services that are expanding as soon as Q1 2019

- Cambridge will be offering a texting service for reps at no cost
- Wealthport is enhancing features to be able to include a goal based portfolio

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