Making It All Work **Together**

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

Annual Renewal Invoice

- The Annual Renewal Invoices are currently available in CLIC
- **December 14th** is the Deadline for invoice acceptance and all registration changes
- If you are new to Cambridge or do not accept your invoice by this deadline, your payment method defaults to debit the total invoice amount from your January 15, 2019, compensation statement

Year-end Retirement Distribution Processing

- As the end of the year approaches, please be mindful of processing deadlines for retirement accounts
- For Details about year-end distribution processing times please click here

RMD Calculations

- When sending required minimum distribution (RMD) calculations to clients make sure to include the standard calculation disclosure
- The best practice is to have all communications with any calculations go through Adview.

Practice Management

Reminders, ideas and best practices from the road

- During this week's rep call we discussed what was learned this year during our office visits
- Specifically, we discussed
    - What you, as reps, are looking for from our weekly calls. The responses were overwhelmingly positive, but there were requests for more extensive calls about complex topics, including:
        - Financial Planning
        - Technology
        - Customer Relationship Management (CRM)

    So look for those and more in 2019.
    - The why behind our annual Branch meeting
        - Benefits and takeaways that come from spending time with your peers
        - The 2019 meeting will take place on May 1st -

3rd. Look for additional information as we get closer to that date.

- The benefits of branch visits and how we use that time to learn more about you and your business. Allowing us to cater the services we provide to what you need most as an advisor.

Larry L. Qvistgaard
President
Duncan Advisor Resources

Duncan Financial Group
311 Main Street
Irw in, PA 15642