

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

Reverse Churning

This week we discussed Reverse Churning. We covered what it is and when and how it could come up in your business.

Email from an unapproved email address

- If you accidentally send an email from an email address that is not your SMARSH approved email, please do the following:

- Contact your OSJ
- Forward the sent email to your Cambridge/Smarsh email so it goes through surveillance.

-If you receive a securities related email to an unapproved email address follow the same steps:

- Contact your OSJ
- Forward the received email to your Cambridge/Smarsh email so it goes through surveillance.

Practice Management

This week we were joined by one of our platinum sponsors for this year's branch meeting, Guggenheim investments.

- Chris Cosantino, Director, Independent Advisor Distribution Sales Manager, with [Guggenheim Investments](#), highlighted who they are, what they do, and what you can expect to hear from their presentation in Orlando.

- The following [presentation](#) was referenced during the call.

Annual Branch Meeting

Registration and Hotel block is still OPEN!

- This year's meeting will be May 1st - 3rd
- The draft agenda for this year's meeting is available [HERE](#)

The meeting will be at the [Reunion Resort](#) in Orlando

- Registration is now open "[CLICK HERE](#)"
- To make your hotel reservation "[CLICK HERE](#)"
 - Our group rate will be available prior to the 1st and after the 3rd if you would like to arrive early or leave after the 3rd
 - We recommend getting your airfare ASAP

Larry L. Qvistgaard
President
Duncan Advisor Resources

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