Duncan
ADVISOR RESOURCES

Making It All Work **Together**

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

Updates to the Compliance Manual

- The Compliance Manual February 2019 Update has been released
- The full compliance manual is available HERE

New Participant Form for Retirement Plans

- Cambridge has a new form for group retirement plan participants, the Retirement Plan Participant Advice Addendum (RPPA). The RPPA is a streamlined form that can be connected to the plan-level agreement, and will take the place of the Financial Planning Engagement (FPE).
- Services under the RPPA could include:
  - Individualized investment advice to plan participants regarding plan assets
  - Personalized financial wellness assessments
  - Recommendations
- Please note, this form is only used if you are working with the employer and provides services to participants through the group plan relationship; plan-level paperwork is still required.

Annual Branch Meeting

Registration and Hotel block is now 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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