



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

Forms Wizard

- Cambridge has updated the [forms wizard](#), making it easier to use. You can be much more specific when selecting the type of account you are opening for your client.

- One of the forms that will always be required is the, ["Understanding the Difference Between Commissionable and Advisory Accounts Brochure"](#)

- This brochure became required on [June 5, 2017](#)

- Additional information is available [HERE](#)

Practice Management

This week we had a great discussion about our upcoming annual meeting.

- Several reps that have attended this meeting in previous years, shared their experience of attending the meeting and the "why" behind how this could be the best way to grow your practice.

- We also covered the most recent agenda which is available [HERE](#)

- Like last year, the meeting will be at the [Reunion Resort](#) in Orlando

- The dates are May 1st - 3rd

- 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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