

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/Administration

- 2019 Firm Element [Continuing Education Program](#) Available

Firm Element is required for

- All individuals with FINRA securities licenses registered with Cambridge Investment Research, Inc., including active producers, licensed administrative staff, and registered solicitors.
- All investment advisor representatives and solicitors registered with Cambridge Investment Research Advisors, Inc.

Deadline for completion: October 30, 2019

Instructions to complete the Firm CE are available [HERE](#)

- Trade Review Change Announcement

- As announced in a [firm-wide E-mail on 7/10/2019](#), the trade review upgrade has officially launched
- For more information, or to access FAQ's, user guides, and other resources, click [here](#)
- Make sure that when you click "Go" in the trade review system that you have cleared out all trades. Your queue should have zero trades remaining at the end of each day.

Practice Management

- Duncan Financial Group's Retirement Plan Services

- Duncan Financial Group's Retirement Plan Services division is hosting a "Legislative and Regulatory Update" webinar for Plan Sponsor contacts on August 22, 2019, at 2:00 pm ET. DFG's marketing team will be sending out the invitation to the DAR branch which you can then forward on to your client and prospect list. They can RSVP through the

link and DFG will send them the information needed to log in to the webinar.

- If you send this invitation to more than one client/prospect, please remember to get it pre-approved through Advview

- Sammons Retirement Solutions

- Max Shapiro, Regional Vice President with Sammons Retirement Solutions joined us to discuss the following topics:

- The Sandwich generation and younger person's annuity. How Accumulation, Income, and Access in the LiveWell Freedom Variable Annuity can hedge against longevity and long-term care while maintaining a steady stream of income
- The LiveWell Fixed Index Annuity providing flexibility to a product without extending surrenders, affecting trails, and hedging against market risk.
- Links
 - FVA [Hypothetical Illustration](#)
 - Wholesaler [Map](#)
 - Preferred Fixed Index [Annuity Client Brochure](#)
 - FVA [Four-Page Flyer](#)

- Join us at [Ignite!](#) September 25-27 in Aurora, CO

- Take advantage of:
 - Business ideas
 - Financial reimbursement from Cambridge
 - Continuing Education credits
 - Networking opportunities
 - Hosted dinner with our branch

**Larry L. Qvistgaard
President
Duncan Advisor Resources**

Securities offered through Registered Representatives of Cambridge Investment Research, Inc., a Broker/Dealer, Member FINRA/SIPC. Advisory services offered through Cambridge Investment Research Advisors, Inc., a Registered Investment Advisor. Duncan Advisor Resources and Cambridge are not affiliated.

The information contained in this email is confidential and is intended solely for the addressee. If you are not the intended addressee and have received this email in error, please reply to the sender to inform them of this fact.