Weekly Rep Call

05/06/2020

Duncan ADVISOR RESOURCES

Making It All Work **Together**

Click the button below to view the recording of this week's rep call.

Call Notes (Click on the red links to learn more):

Do YOU have a topic you would like discussed on the next call? Let us know!
Contact your OSJ, or reply to this E-mail

Practice Management

Excited to announce our NEW 6-week Zoom conferencing program: "Where do we go from here?"

Current schedule:

May 6 – Legg Mason/Clearbridge:

- Recession Dashboard and insight coming out of the recession
  - Click **HERE** for a copy of the presentation slides
  - Click **HERE** for a wholesaler map
- Today we were joined by Regional Director, Taylor Sohns. His presentation not only gives an in-depth view of the recession dashboard, but also provides a deep dive into understanding the recovery dashboard! To see for yourself, click the red button above to view the recording!

Join us next week for another installment of our Zoom conferencing program - details below:

Upcoming:

May 13 – CreativeOne:

- Servicing clients virtually and building a digital presence

May 20 – Snappy Kraken:

- Digital Marketing

May 27 – CreativeOne:

- Riskless and Less Risk investment products

MEETING FORMAT INFORMATION:

*These are all Zoom meetings where the presenters will be sharing their screen (no participant video)

*All lines will be muted, but there will be a chat session that you can utilize to ask questions throughout the presentation

*These meetings are scheduled to last 45 minutes (instead of 30), and will be recorded for on-demand viewing

ZOOM LOGIN INFORMATION:

COMPUTER:
Click the below link, or copy and paste the link directly into your web browser:

https://zoom.us/j/7875573857

Enter the password when prompted (case-sensitive)

- Password: DuncanAR

Once you have joined the meeting, a new window will appear which will allow you to choose how to connect the audio.

- You can proceed using audio through your computer
- You can proceed using audio through your phone. To do this, you will use the Participant ID unique to you, which is displayed at the bottom of the audio selection window
    - Mobile phone (one-tap):
        - +16699009128,,7875573857#
        - Enter Participant ID when prompted
    - Non-mobile phone:
        - Dial 1-669-900-9128
        - Enter the meeting ID when prompted
            - Meeting ID: 787 557 3857
        - Enter Participant ID when prompted

MOBILE PHONE:
Mobile phone (one-tap):
+16699009128,,7875573857#

The meeting ID will be entered for you automatically
You will not need a password or participant ID

NON-MOBILE PHONE:

Dial 1-669-900-9128

Enter the meeting ID when prompted

- Meeting ID: 787 557 3857

Compliance/Administration

Cambridge Satisfaction Survey deadline extended to May 27, 2020

- Be sure to use this opportunity to help Cambridge determine where they should direct their resources and future efforts by providing feedback on this survey
- If you have any questions, or cannot find the survey in your inbox, please E-mail: satisfaction.survey@cir2.com

Thank you for accompanying us on this exciting journey into a new age of technological advancement! We are hard at work to improve the format and execution of our weekly calls, and appreciate your patience and understanding as we smooth out the wrinkles involved in the transition to Zoom digital conferencing!

Additional Resources

Cambridge COVID-19/Market Volatility Page

- Updated lists of state restrictions
- FAQs for Financial Professionals
- FAQs for Serving Clients Remotely
- COVID-19 literature for retail use

Cambridge Coronavirus Update March 30

IRS Filing and Payment Deadlines FAQ

Coronavirus Aid, Relief, and Economic Security Act (CARES Act) Principal Overview

CARES Act Stimulus Package guide

FS Investments Resources for Volatility: Tools to share with your investors

Vanguard Tools for navigating market volatility

Asset TV

EMERGENCY FREE TRIAL: Enjoy Horsesmouth's daily practice management service for no cost for the next 90 days

Security Provider OS33 Offers Free Tool to Help Secure Advisor Computers

Relevant Articles

Webinar Opportunities

CAPITAL GROUP

Volatility 2020: Weathering the storm

Register now: Weekly webinar series

Join Capital Group's investment team as we go deep on the forces roiling markets and the global economy. Every Thursday we'll bring you insights and answer your top questions on the latest developments, from the coronavirus to oil shocks and the likelihood of recession.
Various dates and times | Register HERE

On the radar

Regulation BI Resources:

- REQUIRED Training (**due May 31**):
  - Reg BI, Interpretive Guidance and Form CRS Overview
    - Recording available on **Knowledge Center University** (KCU)
      - Log into KCU and enter 0000062640 in the search bar

- OPTIONAL Training:
  - Form CRS – Customer Relationship Summary
    - Recording available on **Knowledge Center University** (KCU)
      - Log into KCU and enter 0000062720 in the search bar
  - Best Interest Analysis
    - Recording available on **Knowledge Center University** (KCU)
      - Log into KCU and enter 0000062728 in the search bar
  - Documentation & Disclosure Updates
    - Recording available on **Knowledge Center University** (KCU)
      - Log into KCU and enter 0000062841 in the search bar

- Regulation BI **FAQs**
- Cambridge Regulation BI **Resource Page**
- Form CRS **template**

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