

Weekly Rep Call

06/10/2020



Making It All Work Together

Click the button below to view the recording of last 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**

**"Where Do We Go From Here?" series is now complete, and
available for on-demand viewing!**



**Did you miss out on some of the calls in our program? Use
the links below to access notes & recordings!**

Legg Mason/Clearbridge:

- Recession Dashboard & insight coming out of the recession
 - Click [HERE](#)

CreativeOne:

- Servicing clients virtually & building a digital presence
 - Click [HERE](#)

Snappy Kraken:

- Digital marketing overview from the co-founder and CEO
 - Click [HERE](#)

CreativeOne:

- Riskless & less-risk investment products
 - Click [HERE](#)

Cambridge CLIC Advisor/CLIC Client

- Managing client relationships with CLIC Advisor & CLIC Client
 - Click [HERE](#)

Compliance/Administration



Cybersecurity Requirements Announced

- Official list of new Cambridge cybersecurity requirements now available! Click [here](#) to view the full set of rules
- Cambridge and OSJ supervisors will begin auditing for these standards as part of their branch examinations
- Q: Windows allows the use of a pin instead of a password. Is this acceptable, and (if so) would it need to be 8 digits?
 - A: Yes, pins are permissible, and recommended to be at least 6 digits, though 8 would be preferred

CIR2.com login process to change

- Cambridge has **announced** that users will now notice a slight change in the CIR2.com log in process. Users will enter their user name, select Next, and will be prompted to enter their password on a second screen
- A second phase will be rolled out to users in groups throughout June and July. Details regarding Phase 2 will be communicated to individuals based on their planned migration dates

Alternative Investment **Update**

- Cambridge will no longer require original documents to be mailed to the home office for Alternative Investment purchases, redemptions, tender offers or capital call notices
- Original paperwork will still be required to be mailed to the home office if the Alternative Investment Company requires the client's wet signature

Insurance



Duncan Advisor Resources BGA

Brian Duncan, CEO

- Thank you for your business, and congratulations on another great year. Despite COVID-19 challenges, placed premium figures are 10% ahead of where they were last year (as of May, the brokerage is at \$3 million of placed premium, and on pace to beat last year's total placed premium of \$7 million)
- VUL sales grew 11% last year, and Prudential is the top company by production within LIBRA



Prudential Insurance Company

Randy Wolfe, Regional Vice President

Rick Lockwood, Internal Partner

- Watch the recording for an in-depth look at the trends and opportunities in the VUL space, as well as product solutions currently being offered by Prudential

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REMEMBER: many companies have modified underwriting as a response to COVID-19. Jon Theys, Underwriting Director with the BGA, joined us in April to discuss these changes - to view the notes from the call, or listen to the recording, click [HERE](#)

Please contact a member of the **Duncan Advisor Resources sales team** if you have questions regarding these changes or other changes that may be forthcoming from other carriers

ZOOM LOGIN INFORMATION:



Remember to disable video:

these are all meetings where the presenters will be sharing their screen for viewing

Remember to mute your lines:

there is a chat session throughout the meetings that can be used to submit questions

Remember to use the one-touch dialing option if you are using a mobile phone:

this feature enters meeting IDs automatically, so you do not need to manually enter any numbers or passwords

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

These meetings are scheduled to last 45 minutes (instead of 30), but will be recorded for later viewing if you are unable to attend

□ [On the radar](#) □

Regulation BI Resources:

- 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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