

# Weekly Rep Call

05/20/2020



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**

## Compliance/Administration



### COVID-19 Resources removed from call agenda and recording notes moving forward

- Check out any of our **[previous E-mails](#)** if you would still like to explore any of the listed resources

### Reg BI training due in less than two weeks!

- Remember to complete this online training course by May 31st - view **[last week's recording](#)** for a walk-through on how to access the required training within the Cambridge Knowledge Center University (KCU)
  - Log into KCU (use link on right-hand side of **[this page](#)**) and enter 0000062640 in the search bar



### Trade review "flagged" keys guide

- A new miniseries that will cover a new transaction flag each week, explaining why the system generates it, what it is asking from you, and how to respond in CLIC

### Offer & Challenge spots still available!

- Are you still interested in participating? Simply respond to this E-mail to let us know! For more details, see the **[announcement E-mail](#)** from earlier this week

## Practice Management

**Continuing our NEW 6-week Zoom conferencing program:**  
**"Where do we go from here?"**

**Current schedule:**



Robert Sofia is one of three founders of Snappy Kraken and serves as Chief Executive Officer, overseeing the company's strategic direction and enterprise relationships. Robert possesses a unique blend of sales, marketing, and creative ability paired with financial industry experience. He excels at leading specialized teams, engineering financial marketing programs, and managing complex projects.



~~May 6 – Legg Mason/Clearbridge:-~~

- ~~• Recession Dashboard and insight coming out of the recession~~
- ~~• Click [HERE](#) for a copy of the recording notes~~

~~May 13 – CreativeOne:~~

- ~~• Servicing clients virtually and building a digital presence~~
- ~~• Click [HERE](#) for a copy of the recording notes~~

May 20 – Snappy Kraken:

- Digital Marketing
  - Watch the recording to learn more about taking the step from generating leads to converting leads, why less is more, and how to sell the outcome instead of selling the service!
- Snappy Kraken demo available [here](#)
- Territory Verification available [here](#)

**Main Point of Contact: Michael Yebio**

[michael@snappykraken.com](mailto:michael@snappykraken.com)

**386-400-5596**

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

#### **Upcoming:**

May 27 – CreativeOne:

- Riskless and Less Risk investment products

**ADD IT TO YOUR CALENDAR!**

#### **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

□ [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](#)



**Larry L. Qvistgaard, II**

President, COO

Duncan Advisor Resources

30011 Ivy Glenn Dr., Ste. 115, Laguna Niguel, CA 92677

T 800.517.9901 x2230 C 949.306.0060 F 707.676.8633

[www.duncanar.com](http://www.duncanar.com)



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[www.duncanar.com](http://www.duncanar.com)

