

Weekly Rep Call

05/27/2020



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



Regulation Best Interest (Reg BI) Training deadline is May 31, 2020

- Please confirm that you have completed this training in Knowledge Center University. The course will be listed in KCU under the "My Completed Learning" section. If you attended our branch meeting the title of the course is, "2020 LIVE Reg BI". The progress status should state that you have successfully completed the training.
- If you have not completed this training, please click [**HERE**](#) for step-by-step instructions.

Suspending RMD's in 2020

- The CARES Act [**waives RMDs for calendar year 2020**](#) for Defined Contribution (DC) plans, including 401(k), 403(b), 457(b) and IRA plans, allowing individuals to keep funds in their retirement plans.

Practice Management



Continuing 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 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
 - Click [HERE](#) for a copy of the recording notes

May 27 – CreativeOne:

- Today we were joined by Terry Pierce and John Seberger . During their presentation they explained "Risk less" and "Less Risk" investment products. To see for yourself, click the red button above to view the recording!
 - Additional information on the 4 products that were discussed on the call are available in the below links:
 - "Risk less"
 - [Delaware Life](#) Retirement Stages
 - [Protective Life](#) Guaranteed Income Indexed Annuity
 - [Great American](#) Index Protector
 - Less Risk
 - [Great American](#) Index Summit
 - [Great American](#) VIA Index Summit

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

Upcoming:

June 3 – TBD:

- TBD

June 3 – TBD:

- TBD

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](#)



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