

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**

Compliance/Administration



Regulation Best Interest

- Compliance date has arrived! Questions? Watch the recording and check out the resources available in last week's rep call **notes**, or reach out to your OSJ

Refresher: communications with clients

- Cambridge has released a helpful Video Conferencing **bulletin** featuring frequently asked questions and a new **Video Conferencing Best Practices Guide**
- Compliance Reminders When Communicating With Clients **bulletin** provides important items to keep in mind for
 - Smarsh
 - Hard copy correspondence
 - Social Media
 - Text Messaging

Practice Management



Taking a deep dive into financial planning

Special guest speakers joined us to share success stories and different financial planning strategies.

Watch the recording for a compelling presentation on the various keys to effective financial planning, including:

Tom Walsh

- sneak preview: capturing external assets

Bluecap Financial

- sneak preview: crafting a fee structure
- The Fee Complexity Worksheet is **HERE**

Kristen Hull

- sneak preview: utilizing technology to build plans

SPECIAL

OFFER

Available only to financial professionals in our branch, we will be offering training courses in CLIC Advisor planning! Reply to this E-mail if you are interested in taking part. A separate E-mail will follow with additional details about the program!

Larry L. Qvistgaard, II

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