Weekly Rep Call

07/22/2020

Duncan ADVISOR RESOURCES

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

Compliance/Administration

Qualified Compensation Statements

- Want to make sure you are not leaving money on the table? Run Qualified Compensation Statements in CLIC! These reports are available to identify compensation that Cambridge has received, but payment is on hold due to missing licenses or paperwork
  - Pull the Qualified Compensation statements: log in to CLIC and navigate the Control Panel to Reports. Report type – Compensation. Report – Qualified Compensation Statement
  - Check the report to see the accounts that are pending payout, as well as the reason for being held. The most common reasons are:
    - Deceased client
    - License missing for state
    - No paperwork on file
  - Take the steps to correct the items. Once items have been addressed, contact payouts@cir2.com for compensation adjustments

As you are reviewing these reports, if you have any questions please contact the following areas:

- For questions regarding compensation on hold due to missing paperwork, contact Operations Account Supervision at 800-777-6080 ext. 3339
- To obtain a state license, please contact Greg Hicks 800-517-9901 ext. 2231 (Greg.hicks@cambridgesecure.com) or Cambridge Licensing (licensing@cir2.com). Once the appropriate license is acquired, the financial professional becomes eligible to receive future compensation. Any commission earned while a financial professional is not properly state licensed will not be payable
- **For general questions, contact payouts@cir2.com. You may also open a Service Request through CLIC using Commission or Fee Billing as the topic**

Practice Management

Reviving Your Value

- Our measure of worth is not found entrenched in investment performance, but in our ability to provide value. One way to show added tangible value? Integrating tech through CLIC Advisor!
- On the road to fintech & financial planning success, never be afraid to stop and ask for directions! Would you rather learn how to golf from YouTube videos or from a professional instructor? Would you rather learn how to use CLIC Advisor from Cambridge webinars or from our own expert, Kristen Hull?
- With Kristen's multi-week planning programs, participants learn not just how to use the systems, but also how to put strategies into practice
  - Choose between 2-week or 5-week program for option to learn analytics, connections, integrations, investment assumptions, how to enter data, foundational planning, generating reports, advisor vault, CLIC Client
  - 5-week program includes advanced planning and free financial planning marketing material customized with your name & logo!
- Watch the recording to see more about this exciting educational opportunity, and be on the lookout for our commitment E-mail coming your way this week!

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!

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