

Weekly Rep Call

08/05/2020



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

Compliance/Administration



Cambridge Satisfaction Survey

- In an effort to keep pace with the rapid changes we are experiencing this year, Cambridge will be sending satisfaction surveys quarterly. The E-mails will be sent from satisfaction.survey@cir2.com. You may want to add this address to your approved contacts.
- If you have questions, or to request the survey be sent again, please E-mail satisfaction.survey@cir2.com

Policy Update to Share Class Purchase Limits

- Cambridge has **announced** that purchase limits will now be applied at the household level, rather than at the individual level. Purchase limits will remain at \$50,000 for Class B shares and \$250,000 for Class C shares



WealthPort/CMAP update

- To align with regulations requiring level fee treatment across client accounts, Cambridge will be introducing a change in the fee billing selections on brokerage accounts. Specifically, the election to assess platform/program fees to either the financial professional or client must be the same for all managed brokerage accounts

Practice Management

Crystal Neubauer

AVP, Cambridge Education & Events

Virtual Ignite!
September 21st - 25th
Scheduled between 11am - 3pm Eastern Time



- Compliance & CE credits
- Prize Giveaways
- Quality session content
- Advisor panels
- and more!!! Watch the recording to hear about all of the benefits of attending the virtual event this year!

For more information & to register, click [here](#)

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