Weekly Rep Call

08/12/2020

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

Fee Billing Updates for Variable Annuities

- You now have the ability to debit your fee directly from the client's bank account! In order to utilize the feature, you will need to take the following steps:
  - Complete the ACH Authorization-Fee Billing (**FPACHA**) form in its entirety starting at the AIMS/EXHIMA section
  - In addition to a complete FPACHA you will also need to indicate the following on the Exhibit (**EXHIMA**):
    - Section H: Other billing considerations – Indicate ACH on provided line
- For a list of annuity products that allow fee billing directly from the contract itself, click **HERE**

Qualified Compensation Statements

- Cambridge has provided additional guidance regarding the eligibility of compensation payouts. For fee compensation held due to licensing items, Cambridge may not go any further back than the current calendar year. Bring these items to your OSJ for assistance clearing them through payouts for the possibility of getting them paid

Practice Management

Submitting the FPE with BIA form

- Current system limitations require that the best interest analysis be completed in CLIC for financial plans, even though many sections do not apply. Watch the recording for a walkthrough on how to complete the selections
  - Click **HERE** for an example

Virtual events of value

- Cambridge Ignite
  - Registration is not a firm commitment, so be sure to **sign up to attend** even if you are unsure how high your level of participation in sessions will be!
- Asset-Map Advicetech.live
  - Are you looking for new and exciting ideas on how to leverage technology to your advantage in these rapidly changing times? This may be the event for you! Watch the recording for more information on what you can expect from attending!

September 21-25, 2020
11:00 AM to 3:00 PM EDT

Ignite includes the opportunity to deepen your knowledge and elevate your business by obtaining firm element, continuing education, and annual compliance meeting credits.

Accompanying you on your journey will be Cambridge management and staff as well as many of the individuals with whom you do business, resulting in networking opportunity.

Click **HERE** for more information!

ADVICETECH.LIVE

A VIRTUAL SHOWCASE OF ADVISOR TECHNOLOGIES

Thursday, August 27th, 2020
10:30 AM to 5:00 PM EDT

Asset-Map is hosting one of the biggest financial advisor technology events of year!

20 of the most sought-after companies in our industry - including eMoney, MoneyGuidePro, Morningstar, and more - are coming together on one stage to explain the future of the industry and how each individual tool is adapting to help shape the future of financial advice for our advisors.

Click **HERE** for more information!

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