

Weekly Rep Call

09/09/2020



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



Virtual Entertainment of Clients

- Financial professionals should maintain a log for each virtual event that they host - this log should be available to Cambridge upon request. Log should contain:
 - Invitees (names and email addresses)
 - Description of the virtual entertainment
 - Value (dollar amount) of the food and beverage provided for the virtual event
- As host, the financial professional should interact with each virtual participant during the meeting, and remain present and visible throughout the meeting
- Virtual entertainment will not include any cash or non-cash compensation (e.g. gift cards or other non-food items)
 - Gift cards would be considered gifts subject to gifting limits and documentation: \$100/year/person, recorded in the financial professional's gifting log
 - The \$100 per person per year limitation on gifts will **not apply to food or beverages that are sent to clients or prospective clients for the purpose of consumption during a virtual business entertainment event or video meeting**
- Sponsor company payment of costs associated with financial professional hosted virtual entertainment should be submitted to compliance@cir2.com and follow existing policies for Cash and Non-Cash Compensation

Practice Management

Kick-starting your fourth quarter

How does your progress compare to your plan for 2020? With Q4 on the horizon, time is of the essence to close the year strong! If you are looking for a refresher on some of the items that have been discussed, check out the links below:



Rep Calls:

- [Goals and Planning for 2020](#)
- [Continuing our discussion on planning for 2020](#)
- [Closing comments on planning for 2020](#)
- [Where are you with your 2020 marketing plan?](#)
- ["Where Do We Go From Here?" complete series](#)

Links & Resources

- [COVID-19 Rep Call Agenda Link Collection](#)
- [Presidential Election Reference Material](#)
- [Discounts on Marketing & Website Design](#)
- [Customized Marketing and Website Development solutions offered through Cambridge Source](#)



**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!

Larry L. Qvistgaard, II

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