

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



Reminder: Best Interest Analysis tool in CLIC

- Cambridge recently advised us that several FPs in our branch still have accounts with BIA selections unaligned with the monitoring guidelines established by Reg BI
- As a reminder, BIA selections must follow this structure:
 - Active strategy, defaults to ongoing monitoring
 - Management strategies available: managed discretionary, managed non-discretionary, and personal securities
 - Passive strategy, ongoing monitoring is selected
 - Management strategies available: managed discretionary, managed non-discretionary, and personal securities
 - Passive strategy, no monitoring is selected
 - Management strategies available: commission and personal securities
 - Buy-and-hold strategy, defaults to no monitoring
 - Management strategies available: commission and personal securities
- Cambridge is communicating directly with those financial professionals with incorrect BIA monitoring selections. Please respond to the E-mail requests from home office, or contact them directly at:

ops.acct.sup@cir.com
1 (800)777-6080 ext.3339

Helpful Links:

[10/28/2020 Call Recording](#)

[Cambridge bulletin](#)

[Sample Cambridge E-mail](#)

[CLIC BIA Tool Quick Reference Guide](#)

Website Replacement

- Cambridge will be releasing a replacement related to the

cir2.com website in the coming weeks. It will have a similar look and feel to their public website, and will feature enhanced navigation, search functionality, and ease of use

FinTech



Cambridge Practice Management Team Jeffrey Ring | Strategic Business Coach

What are the different social media platforms? What are the benefits and drawbacks of each? How can I use them? Why should I use them? If you have these questions on your mind, this is the call for you! Watch the recording for a detailed look at your options for establishing a digital presence in 2021!

Larry L. Qvistgaard, II

President, COO

Duncan Advisor Resources

30011 Ivy Glenn Dr., Ste. 115, Laguna Niguel, CA 92677

T 800.517.9901 x2230 C 949.306.0060 F 707.676.8633

www.duncanar.com



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DUNCAN ADVISOR RESOURCES | 311 Main Street Irwin, PA 15642
www.duncanar.com

