

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



Hard Copy Correspondence Compendium

Late submissions from financial professionals are being scrutinized more heavily. Use the tips below to keep compliant!

- You can view your missing submissions in CLIC. Please use the "Past Due Submissions" in the add submission section of correspondence. Additional instructions [here](#)
- Check your inbox! We send E-mails with **reminders** of upcoming and late correspondence submissions
- If you would like an additional way to give yourself a reminder, you can also use **Outlook**
 - For additional assistance creating reminders in Outlook, contact **Greg Hicks** for assistance
- What NOT to submit as correspondence:
 - Securities account forms
 - Sponsor documents, etc.
 - Correspondence from the home office
 - Confirmations
 - CIRStatements reports without manually entered accounts
 - Advertising materials
 - New or Existing Account paperwork
 - However, any cover letters that a client sends along with completed account paperwork DO need to be submitted as correspondence
 - Copies of emails
 - "Junk mail" or spam faxes
 - Trade blotters
 - Check blotters or copies of checks
 - Non-investment related correspondence (e.g., utility bills, cell phone bills, junk mail)
 - Tax documents
- A correspondence video tutorial is available [here](#)
- You may also refer to the CLIC [Correspondence Review User Manual](#) for any additional guidance



Duncan Advisor Resources [Website](#):

- Email [Greg Hicks](#) or your OSJ to gain access
- Has all of our weekly and special calls right at your fingertips
- Access Duncan Walsh Advisors client approved materials
- Enhancements to the site are underway to make it easier to search and see the content you're looking for
- Suggestions are always accepted. Please send your thoughts to [Thomas Block](#)

Investment Opportunities



Jackson National Life Insurance Company
Ronald Wright CLU, ChFC, MBA, CFS | Regional VP

Updates from Jackson on their demerger, Income Stream Options, and their Flex Death Benefit

- A brief overview of the recent demerger announcement
- The latest on their comprehensive income stream options
- A playbook of case study's to understand the power of this Death Benefit Rider to help your clients provide the legacy they want

[Income Stream Grid](#)
[Flex DB Playbook](#)

Questions? Contact your local wholesaler (877)552-1220!

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

