

# Weekly Rep Call

3/10/2021



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



### GA/Cambridge Sponsor News:

Went through what updates are going on in the securities side, as small tidbit on the newest Asset-based LTC to hit the market (**see link in red**), and a save the date for our March 24th rep call that includes a Duncan BGA update.

### **Lincoln Market Advantage**

### Clients with a second residence:

If a client has a second residence, then the financial professional must become securities registered in the state where that residence is located. For example, if a client is a "snowbird", maintaining their primary residence in a northern state but moving south to a warmer climate in the winter, the financial professional must be registered in both states in which the client resides.



An exemption exists that allows a financial professional to continue to conduct business with a client that is on a brief vacation in a state where they are not securities registered, but this only applies if the client spends fewer than 30 days in that state.

Financial professionals must file an application for registration in the state within 10 business after discovering that a client has been in the state for 30 or more consecutive days (this requirement applies even if the clients do not own the residence where they are staying for that 30+ day period).

It is important to note that if a client changes the mailing address on file, the financial professional must become securities registered in the state where that address is located, regardless of the amount of time spent by the client at that location.

When selling or servicing insurance products, keep in mind that Cambridge requires that financial professionals must be insurance licensed in both the state where the contract is signed and the

client's state(s) of residence.

If you will be spending an extended time in a state where you are not securities licensed, reach out to your OSJ for additional guidance regarding registration requirements

Awaiting response from Cambridge: questions regarding extended stays in foreign countries, and prolonged travel without a steady address. Tune in next week for the answers!

## Investment Opportunities



### CNL Strategic Capital

Gordy Wilhite, National Sales Manager

#### Private Capital: A Unique Private Equity Strategy

CNL Strategic Capital is a company that owns private companies and seeks to provide long-term growth and monthly income to retail and institutional investors outside of the publicly traded financial markets. The potential for competitive returns by accessing private companies has been traditionally reserved for institutional investors and high-net-worth individuals, but CNL provides first-time access to a unique private equity strategy for individual investors: private capital. All while offering a lower portfolio fee structure than traditional private equity. If this sounds like a fit for your clients, watch the recording for a comprehensive presentation, or contact your local wholesaler!

[Overview Brochure](#)

[Fact Card - Combo Shares](#)

[Presentation Slides](#)

[Territory Map](#)

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