

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**

Branch Announcements



Update:

We are happy to announce that the logistics for the 2021 Duncan Advisor Resources Annual meeting have been finalized:

- **Where?** Paradise Point Resort & Spa
 - Fly into SAN – San Diego International Airport
- **When?** June 23-25, 2021
- **Why?** Education, networking, and fun times with your fellow financial professionals on the scenic Pacific coast!

For more information, and to register, click [HERE!](#)

Investment Opportunities



Columbia Threadneedle

Doug Lewis, Regional Vice President
Seth Buks, Client Portfolio Manager

When will life finally return to normal? Today's presentation covers Columbia's innovative "return to normal index" in order to answer that very question, including what important trends they are watching, and what could drive change as we move forward.

As the march towards normal progresses, Columbia Thermostat Fund seeks to capitalize on these changes with their multi-asset solution, which takes the guesswork out of investing by automatically buying low and selling high. Watch the recording to learn how their disciplined process is designed to remove the emotion from investing with a portfolio comprised of competitive underlying investments.



[Territory Map](#)
[Return to Normal Index](#)
[Thermostat Presentation Slides](#)
[Thermostat Scatterplot](#)
[Columbia Threadneedle Blog](#)

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