Weekly Rep Call

4/28/2021

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

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!

Around The Product Block

SharesPost100 Fund update:

- Effective April 30th, 2021 the name of the fund will become The Private Shares
- Tickers are not changing: PRIVX A share, PRLVX L share, and PIIVX I share (preferred managed account share class)
- Interval Funds require training to be completed through Knowledge Center University
- **Quarter 1 Commentary Quarter 1 Fact Sheet**

Spring Cleaning your Model Portfolios:

- Now is a good time to get into WealthPort and review your model portfolios to see if there are funds no longer available for purchase, changes in share class, or consolidated into another fund
- Cambridge makes updates monthly
- **The Latest Fund list as of 3/31/21**

CJ's Compliance Corner

WealthPort/CMAP reminder:

- Recent Cambridge communication includes new deadline

related to fee consistency across accounts
    - Please complete **survey** by May 14th
- Use this **link** for additional resources
- For questions, E-mail CMAPWP@cir2.com or call Cambridge's dedicated line at 855-692-2152. You may also call Cambridge Partner Support to contact the Advisory Compliance Team at ext. 5705, or the WealthPort Services Team at ext. 3342

Practice Management Opportunities

EveryIncome:

Ted Mekonnen, CEO & Founder

Bill Rack, Senior VP, Director of Business Development

When you are looking to edge out the competition, a unique value-add could be just the ace you need up your sleeve. Watch the recording to learn how you can boost your customer engagement and acquisition by offering financial wellness benefits to your clients and prospects through EveryIncome. Service benefits include:

- Customization available to match your own branding and colors across the platform for a seamless experience for clients
- Secure data management
- Fast and easy signup process
- Feature Access Control: enable or disable platform features to give your clients the perfect experience
- Real-time Reporting: analyze usage and identify trends across user engagement

For more information, contact:

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