

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



Socially Responsible Investing:

- More clients are looking into ESG funds
- Cambridge makes it easy to do the research on the WealthPort Platform
- [ESG funds list](#)

Product Study Group

- As things normalize more, this is the perfect time to help reach your business goals through additional product knowledge.
- Have a product you don't understand? Ready to dive in deeper so you can bring a solution to your clients?
- Reach out to me directly and let me know what you want to understand better,

CJ's Compliance Corner

Hard copy correspondence reminder demo

With Cambridge taking a disciplinarian's approach to timely hard copy correspondence submissions, your punctuality is more important now than ever! Watch the recording for a demonstration on how to add



recurring reminders in Outlook, so you can set it and forget it!

Prefer a step-by-step guide?

[2021 Correspondence Calendar Reminder Walkthrough](#)

Also, see our guide for how to set E-mail signatures:

[2021 E-mail Signature Disclosure Walkthrough](#)

2021 branch reviews announcement

Stay tuned for details about your upcoming branch audit - efforts are underway to contact everyone about scheduling these visits

Investment Opportunities



Griffin Capital Securities, LLC:

Cory D. Calvert, National Sales Director

What are Qualified Opportunity Zones? Watch the recording to hear how the 2017 Tax Cuts and Jobs Act created this new economic development, where Griffin Capital is positioned, and which of your clients should understand this product offering.

[What you need to know about QOZF's](#)

[GIREX Holdings](#)

[GIACX Holdings](#)

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