

Weekly Rep Call

5/19/2021



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

Continuing our 2021 Branch Meeting Sponsor Series

Current schedule:

~~May 6 — Griffin Capital Securities, LLC~~

- Click **HERE** for a copy of the recording notes

~~May 12 — Bluerock~~

- Click **HERE** for a copy of the recording notes

May 19 – Greenbacker Capital

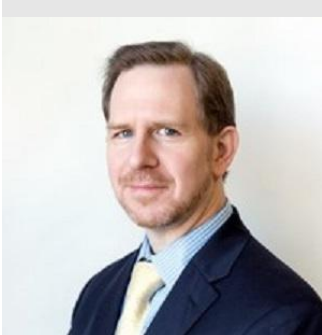
May 26 – Advisors Capital Management

June 2 – iM Global Partner

June 9 – AssetMark

June 16 – Horizon Investments

Around The Product Block



DWA First Quarter Returns

Due to an auditing issue, the returns for the 1st quarter were delayed. Many apologies but as of today it is in Advview for review and approval.

Docusign Updates

Listen to which two insurance companies are now allowing CLIC docusign for their new business paperwork.

Defined Benefit Pension News

Listen to the newest update at Cambridge when it comes to DB plans

CJ's Compliance Corner



Reminders:

Fee consistency across client accounts

- Recent Cambridge [communication](#) includes confirmation that J5M or A1Y personal accounts will no longer have access to using WealthPort Tools after the August implementation
- 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

Multi-factor authentication

Recent Cambridge

- [E-mail](#) explains the need for Multi-factor Authentication (MFA), the plan to meet our anticipated deadline of July 1, 2021, and the FAQs to help determine your actionable items
- Cambridge is dedicated to supporting you in your business. Teams are ready to answer questions and facilitate your implementation of MFA

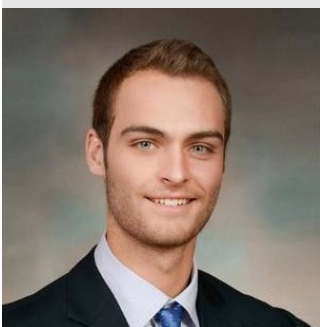
Contact the Compliance Communications Team (compliancecommunications@cir2.com) or the Technology Consulting Team (techconsulting@cir2.com) at 800-777-6080 x3337 with any questions or for any additional information about this change

Updates:

Outside Business Activities & CIR2 Website

- Cambridge will be rolling out new platforms for both the OBA system, as well as the main CIR2 webpage - more detail to be given during next week's branch call!

Investment Opportunities



Greenbacker Capital

Corey Brennan - Internal Sales Associate

Brandon Praznik - EVP, Business Development

In an era of global uncertainty, where can a risk-averse investor go to find reliable income? At Greenbacker, it has been business as usual even through the pandemic. They invest in renewable energy and sell electricity—a necessity under any circumstances. Watch the recording to discover how their strategies can benefit your clients!

[Greenbacker Presentation](#)



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