Weekly Rep Call

5/26/2021

Duncan
ADVISOR RESOURCES
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~~

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

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

The quarterly performance report is available and approved for client/prospect use. Access it by **clicking this link**

CAAP Update - CLS Investments

Effective 6/1/21, no new accounts or model changes will be accepted. If you have client accounts, you must change them to a different strategy partner by October 1st 2021. If you don't, by October 31st they will be moved to a commission account.

CAAP Update - Buckingham Strategic Partners

Due to its material deficiencies, they are now on a watch list. New account can be established. If those items have not been resolved, then it is possible they will be removed from the platform

CJ's Compliance Corner

Reminders:

Fee consistency across client accounts

- Recent Cambridge **communication** includes updated decision trees and timelines related to 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

Updates:

Outside Business Activities

- Cambridge will be transitioning to a new OBA platform in July. We will have a demo in June, so stay tuned for more!

CIR2 Website

- The updated Cambridge website is now scheduled for June 4th. You can access the Beta cir2.com site now by going to https://aem-prod.cir2.com/home/ and use your existing login credentials for the existing cir2.com site

PRO Act

- Efforts are underway to get our industry exempt from the PRO Act even though the PRO Act itself will most likely be passed by Congress and signed into law. Cambridge encourages you to lobby your U.S. Senators on this very important issue

Investment Opportunities

ADVISORS CAPITAL MANAGEMENT

Advisors Capital Management, LLC

Claire Comerford - Director of Investment Products & Sales

Wacth for an introduction to ACM, a look at how they can fit into your clients' portfolios, and a unique value-add available to you!

Call attachments:

Who is ACM?

ACM Investment Professionals

Statement Review Brochure

Statement Review Request Form

Territory Map

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