

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~~

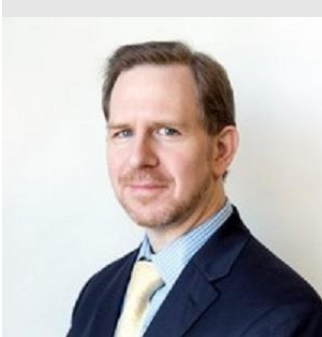
- Click **HERE** for a copy of the recording notes

June 2 – iM Global Partner

June 9 – AssetMark

June 16 – Horizon Investments

Around The Product Block



DWA Fact Sheets

Fact sheets have been updated to May 21st 2021 and located on duncanar.com or you can access them **here**

Great American Life Acquisition

MassMutual completed their acquisition of GAL last Friday. They will be an independent subsidiary and so far no changes to their Fixed and Fixed Index Annuities.



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:

Cambridge Ignite

- **Announced** for October 27-29, 2021 in Nashville, Tennessee

Pershing:

Abandoned Property Management

- Pershing will process their quarterly abandoned account transfer on Monday, June 21, 2021. After assets are transferred into Pershing's abandoned property range, they are no longer visible to Cambridge or our financial professionals
- Accounts eligible to be transferred have either a Returned Mail restriction or an Abandoned Account restriction on them. If an account has either of these restrictions, please use CLIC to update/confirm the client's current mailing address by Friday, June 11 to prevent the assets from being transferred

Qualified Retirement Plan Document Restatement

- With cycle 3 of document restatement underway, changes are coming to new & existing qualified retirement plans at Pershing. Ascensus has been utilized previously for access to pre-approved prototype documents, however, new and existing plans will now begin fully transitioning to Ascensus. This includes all Individual 401(k), 401(k) Profit Sharing, Profit Sharing only and Money Purchase Pension plans using Pershing plan documents
- See **bulletin** for full details of how plans will be impacted
- For questions regarding the Pershing/Ascensus document-only restatement process, contact Services at (866) 775-9118 or pershingplandocs@ascensus.com
- For Individual(k) Document with Recordkeeping Service questions, contact Ascensus at (800) 345-6363 option 1
- For General Cycle 3 QRP restatement questions, contact the Cambridge Retirement Center team, retirementcenter@cir2.com or (800) 777-6080 Ext. 5698

Investment Opportunities



iM Global Partner

Jeff Royal - Director Distribution (Head of US Field Sales)

j.royal@imgp.com

Jack Chee - Director Portfolio Management/Head of Fixed Income Strategies

Jack.Chee@lgam.com

Listen to Jeff's introduction to the firm and Jack's thoughts on the credit markets and a great client solution you can bring.



Call attachments:

[Presentation to DAR](#)

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