

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

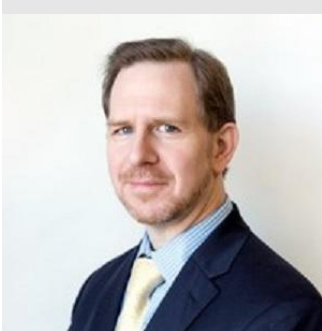
June 2 — ~~iM Global Partner~~

- Click [HERE](#) for a copy of the recording notes

June 9 — ~~AssetMark~~

June 16 — ~~Horizon Investments~~

Around The Product Block



FSI Covered Advisor Health Program

FSI held a webinar on June 8th 2021 to discuss how the health program works along with the other insurance benefits they provide to financial advisors. You can access the recording by clicking [HERE](#) to watch it on demand

VOYA Select Advantage Compensation Change

If you had SA accounts serviced by Venerable, after June 7th the compensation will go to weekly (from daily) and be in line with any newly established accounts. Reach out to me if you would like to learn more about how VOYA SA accounts work.



Reminders:

Fee consistency across client accounts

- 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

Cambridge E&O Policy Renewal

- Cambridge's E&O policy will renew on June 15. For pricing and coverage information, see [this](#) bulletin

Updates:

Multi-factor authentication (MFA)

- As announced in May's Cambridge [E-mail](#), MFA is being initialized for financial professionals currently utilizing the @cambridgesecure.com Smarsh domain. Once a user's enrollment is complete, the next login attempt will lead to a website for choosing the preferred authentication method (an app on a mobile device, a text message, or a voice call)
- If you have any questions, or if you are in need of any additional information regarding MFA, contact:
 - the Compliance Communications Team (compliancecommunications@cir2.com)
 - Technology Consulting Team (techconsulting@cir2.com) or reachable at (800)777-6080 x3337

Release of Redesigned cir2.com

Ladies and gentlemen, we are **live!** As with other releases of new technology, Cambridge is still actively working to identify and correct issues that financial professionals encounter. Please Cambridge's team at PublicRelations@cir2.com with any questions.

Investment Opportunities



AssetMark, Inc.

C. Shane Chareonchump, CFP

Regional Consultant: Mid Atlantic States

Shane.Chareonchump@assetmark.com

Chris Randal

Regional Consultant: Mid Western States

chris.randal@assetmark.com



AssetMark has provided independent advisors and their clients with unique investment and wealth management solutions, and business consulting to help grow their business for over 25 years. During this presentation we'll be discussing how we help advisors ensure their clients are on track to achieve their financial goals with investment, technology, and business consulting capabilities.

Call attachments:

Larry L. Qvistgaard, II

President, COO

Duncan Advisor Resources

30011 Ivy Glenn Dr., Ste. 115, Laguna Niguel, CA 92677

T 800.517.9901 x2230 C 949.306.0060 F 707.676.8633

www.duncanar.com



Securities offered through Registered Representatives of Cambridge Investment Research, Inc., a Broker/Dealer, Member FINRA/SIPC.

Advisory services offered through Cambridge Investment Research Advisors, Inc., a Registered Investment Advisor. Duncan Advisor Resources and Cambridge are not affiliated.

The information contained in this email is confidential and is intended solely for the addressee. If you are not the intended addressee and have received this email in error, please reply to the sender to inform them of this fact.

DUNCAN ADVISOR RESOURCES | 311 Main Street Irwin, PA 15642
www.duncanar.com

