

# Weekly Rep Call

7/14/2021



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**

## CJ's Compliance Corner (featuring Larry Qvistgaard)



### Reminders:

#### Fee consistency across client accounts

- As we move toward August implementation, be sure to continue checking the updated timelines for important dates
- Use this [link](#) for additional resources from today's call
- For questions, E-mail [CMAPWP@cir2.com](mailto: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
- For all clients that are remaining in CMAP, the negative consent letters are being sent out this week

#### Advocating for your clients when their identity is stolen

- If you find out your client's identity has been stolen, please use the following best practices:
  - Notify Cambridge and your OSJ
  - Recommend to your client that they change all financial related passwords
  - Have the client look into investing in credit monitoring
  - If you get an email request that looks to be from your client, do not respond to the email but instead call your client to confirm that they are making the request
  - You and your client can always add personal identification questions. The question should contain information that was not compromised.
  - You client can always put a freeze on their financial accounts
  - Additional information is available in the [Cambridge Resource Center](#)

#### Referral Bonus

- Through the end of 2021 if you refer a financial professional to Cambridge you will receive double the normal referral bonus
- The bonus is 2% of the GDC that the financial professional

produces

- If you refer three or more financial professionals who each produce more than \$250,000, Cambridge will pay for your hotel room at Ignite in Nashville

## Investment Opportunities



### Inland Securities Corporation

**Roderick S. Curtis**

**Executive Vice President, Investment Funds**

**[rod.curtis@inland-investments.com](mailto:rod.curtis@inland-investments.com)**

As advisors and clients look at ways to capitalize on the real estate market through traded and non-trade options, one area you may not realize is taking off is within the manufactured housing communities. Listen in as Rod goes over the MH Ventures II opportunity.

**Call attachments:**

**[MH Ventures II](#)**

### Larry L. Qvistgaard, II

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