

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**

## Around The Product Block



### CMAP/WealthPort Prefix Update

Cambridge recently altered the blueprint for how prefixes will be displayed through the CLIC® account open process. All standard prefixes are available and displayed through the account open process. In addition, each prefix is accompanied with a description that identifies the program the prefix belongs to and other key details about the prefix where needed. When opening a CMAP account, it is also important to select the CMAP prefix that aligns with how your book of business allocates ticket charges.

[\*\*NEW Pershing Prefix table\*\*](#)  
[\*\*NEW NFS Prefix table\*\*](#)

## CJ's Compliance Corner



### 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
- 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

#### Firm Element Requirements

- Each year, Cambridge financial professionals must complete three parts to satisfy the annual Firm Element:
  - Anti-money Laundering (AML)
    - Available online only - access through Knowledge Center University (KCU) in August
  - Annual Compliance Meeting (ACM)
    - Available online
    - Available at Ignite

- Available at our branch meeting
  - If you attended the ACM at our branch meeting this year, you will receive credit in August, once Cambridge has loaded Firm Element into KCU. Please contact me if you do not receive credit by September 1st
- Two elective Firm Element (FE) trainings
  - Available online
  - Available at Ignite
  - Available at our branch meeting
    - If you attended one or both of the eligible sessions at our branch meeting this year, you will receive credit/s in August, once Cambridge has loaded Firm Element into KCU. Please contact me if you do not receive credit/s by September 1st

## Investment Opportunities



### Baron Capital, Inc

**Wayne Ouimette**

**Vice President - Regional Director**

[wouimette@baronfunds.com](mailto:wouimette@baronfunds.com)

**Jeff Kolitch**

**Portfolio Manager - Baron Real Estate Fund & Real Estate Income Fund**



Learn about how this Real Estate fund is distinguishing itself amongst its peer group.

**Call attachments:**

[Real Estate Fund Treasury Yield](#)

[Real Estate Income Fund Face Sheet](#)

[Real Estate Fund Fact Sheet](#)

[Barron's Article Reprint on RE Fund](#)

[Baron Funds - Case for Real Estate](#)

[Baron Wholesaler list](#)

### Larry L. Qvistgaard, II

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