

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**

LQ's Compliance Corner



Reminders:

Increase in mobile check deposit limit, but source of funds documentation still required

- Effective immediately, the deposit limit for check deposit via the Remit Pro Mobile App has been increased to \$10 million. \$500,000 remains the deposit limit for check deposit via the NetX Investor Mobile App.
- Source of funds must be obtained and documented for all brokerage and direct accounts funded with a 1st party check (over \$10,000) or 3rd party check (over \$500). This information should be documented on the Source of Funds Form or uploaded into CLIC®. This also pertains to mobile deposits.

As of August 16, 2021, the WealthPort Wrap Client Agreement and Application version date 071521 will be required and the older version dated 040821 will no longer be accepted

- See the communication [here](#)

CMAF Account Conversion – stay up to date on important dates and details by visiting the CMAF Prefix Conversion and Fee Payment Consistency page on cir2

- On Friday, August 13, the new Pershing CMAF accounts will be opened. These new accounts will not be funded until Monday, August 23, but they will be visible in CLIC®, NetX, and NetX Investor.
- Details here: [CIR2 News Update](#)



DWA Updates

In 5 of the 6 Active DWA models, we brought in Diamond Hill High Yield a few months ago as part of our Duncan IPC due diligence. We knew about the pending merger at that time and it occurred over the weekend. Your clients will now see Brandywine GLOBAL High Yield. Updated fact sheets are now found on the [duncanar.com website](https://www.duncanar.com). More details in the link below.

https://www.cir2.com/content/dam/cir2/documents/products/diamond_hill_reorganization.pdf

Save the Date August 13th 2021 11am EST

For those who missed the presentation at the 5th Annual DAR Branch Meeting, we are pleased to have the panel of Financial Planning professionals back again to expand on their discussion related to the panel topic [“Financial Planning In Practice”](#). Please register with the email you should have already received.

New Vendor added - MyNameFlow

MyNameFlow is an automated marketing platform that helps find lost prospects and drive engagement. Cambridge financial professionals can now enroll in a 30-day free trial and will receive a 20% discount if they choose to continue using the system after the trial has ended. MyNameFlow helps grow prospect lists by scanning online accounts (e.g., Gmail, Yahoo, Office365) and your sent email to identify potential contacts. The system generates a monthly personal finance newsletter with pre-reviewed content including trending articles to engage your prospects. Your newsletter can be submitted to AdView and then distributed through MyNameFlow. The system also helps identify life events, so you can reach out to prospects at the right time.

To learn more go to <http://www.mynamelflow.com/enroll>

Investment Opportunities



Voya Investments

Ryan Barnett

Senior Regional Director

Ryan.Barnett@voya.com

The special needs and disability community is a segment of our population that require attentive and special planning. Tune in to hear Ryan speak about the different types of disabilities, the research behind the financial effects of caregiving, and key considerations for this community.

Call attachments:

[Voya Cares Presentation](#)

[Chartered Special Needs Consultant](#)

[Special Needs Planning checklist](#)

[Employer Checklist](#)

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