

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



Reminders:

Fee consistency across client accounts

- As we near the end of 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 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 Ignite

- Registration closed
- [Agenda](#) now available
- Save the date for our branch dinner on that Thursday!

Updates:

2021 Cambridge Firm Element

- Cambridge's Firm Element Program is now available in Knowledge Center University (KCU)
- The deadline for completion is November 15, 2021
- Only one of each must be completed:
 - **Anti-Money Laundering** MUST be completed on KCU
 - **Annual Compliance Meeting** credits can be completed either on KCU or at a live event
 - Credits from our branch meeting have NOT been applied by Cambridge yet - stay tuned
 - **Complex Products** currently only allows for online completion
 - **Electives** can be completed either on KCU or live
 - Credits from our branch meeting HAVE been applied by Cambridge. If credits are missing in this section, please reach out to [me](#)
- Watch the recording for a walkthrough of KCU navigation



Life Insurance Awareness Month Tools

- September is Life Insurance Awareness Month. Perfect opportunity to look at your book of business and find clients who need to have the conversation or a beneficiary review.
- go to <https://duncanar.com/> on the top right, click login. Once logged in, on the top ribbon click Sales Support and scroll to 2021 Life Insurance Awareness Month for all of the marketing materials
- Any marketing materials you want to use with clients, please submit through the normal AdView process.
- Contact the DAR Life Brokerage Division team if you need ideas or help with this material robb.stottlemyer@duncanar.com

Investment Opportunities



Sierra Investments

Bill Phillips

Senior Portfolio Specialist

bphillips@sierrainvestment.com

Listen in as Bill goes over why predictions in the fixed income market don't work, the typical risks in fixed income, and how Sierra Tactical Core Income and Sierra Tactical Bond can help you navigate through the fixed income "noise."

Call Attachments

[Solving the Core Fixed Income Challenge](#)

[Sierra Tactical Bond Fund - An Alternative Approach](#)

[Sierra Tactical Core Income Vs Rising Rates](#)

[Sierra Tactical Core Income Performance](#)

[Sierra Tactical Bond Fund Performance](#)

[Sierra Mutual Funds](#)

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