Weekly Rep Call

11/03/2021

Duncan
ADVISOR RESOURCES
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

Upcoming Rep Calls

November 10th - Quarterly DWA funds update from Dave Duncan and Tom Walsh
November 17th - Franklin Templeton presentation on Social Security Planning
December 1st - Duncan Financial Group: Support where you need it for your practice
December 8th - The Power of FlexGuard Income by Prudentia
December 15th - Wealthbox CRM: Going over the features and simplicityl

CJ's Compliance Corner

Reminders:
Annual Compliance Questionnaire

- The ACQ is now available, and due by December 1, 2021
- Watch the recording for walkthrough on how to access and complete the questionnaire in RegEd

Firm Element

- Due by November 15, 2021
    - For a demonstration on how to access the programs, or confirm completion, watch this recording
- Annual Compliance Meeting attended at Ignite should be loaded into Knowledge Center University by the end of next week. If you do not receive credit by that time, please contact:

Catherine Lavoie
T 800.517.9901 x2310
Catherine.Lavoie@cambridgesecure.com

Updates:
WealthPort Wrap Client Agreement and Application

- Cambridge has updated the WealthPort Wrap Client Agreement and Application, effective October 22, 2021. The new version date 102221. These are material changes, the WealthPort Wrap Client Agreement and Application version dated 071521 will continue to be accepted through November 22, 2021. As of November 23, 2021, the WealthPort Wrap Client Agreement and Application version date 102221 will be required and the older version dated 071521 will no longer be accepted.

Around the Product Block

BRG Series T Preferred Stock Offering Approaching Final Close

There are only two more closings for the Bluerock Residential Growth REIT's Non-Traded Series T Redeemable Preferred Stock offering, with the final closing scheduled for November 19, 2021, unless the offering is fully subscribed on an earlier closing date.
In order to allow adequate time for suitability review and processing prior to the final close date of November 19, purchase paperwork should be submitted to Cambridge no later than November 10. Paperwork submitted after this date will be processed on a best efforts basis.

CAAP Model Additions from Fidelity, BlackRock and T. Rowe Price

On October 22nd, 2021, new CAAP, SAS, and UMA models were added to the WealthPort platform. These different models give you even more options from some of the best money managers in the industry. To learn more about the specific portfolios added, **please click this link**

CAAP Quarterly Review This Week

Beginning the week of November 2, 2021, all CAAP® accounts held at Fidelity Clearing & Custody Solutions (FCCS) and Pershing LLC will be reviewed against their assigned model to determine if a position has drifted beyond its designated tolerance range. Accounts will be reviewed and traded if positions within the model have drifted outside of the tolerance bands.

New FIA: WealthChoice from United Life

Wealth Choice by **United Life**, is the newest FIA approved on the Cambridge Platform. It has a 5 or 7 year surrender option, an income rider that is the same no matter if it's single or joint life at .75 basis points, and the income never reduces if the account reaches 0. This is a direct option so please click the link above to contact them and register on their site.
Wealth Choice at a Glance
Wealth Choice Income Rider

Check out duncanar.com

That's it! Check out the new site.

Practice Management

College Funding Solutions

Roger Lorelle

President
rlorelle@cf-solutions.com

In light of the current college cost landscape, where college costs can often exceed $250,000 for one child, financial advisors should be able to offer clients more than just savings strategies. Joining us for our meeting will be Roger Lorelle of Collegiate Funding Solutions.

Roger will overview the CFS-provided capability, approved by CIR, that equips advisors to help clients save ON and not just for college costs.

Having a differentiate college-planning capability can help you acquire new clients, deepen relationships and grow your business and revenue.

DISCOUNT ALERT: If you register with CFS by close of business 11/5/21, you will get 25% off your subscription option. You must call or email CFS that you are affiliated with Cambridge and Duncan Advisor Resources

Call Attachments
CFS Overview

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