

Weekly Rep Call



11/10/2021

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

Upcoming Rep Calls

November 17th - Franklin Templeton presentation on Social Security Planning. Learn the SS tool now

<https://www.franklintempleton.com/tools-and-resources/tools/social-security-optimizer>

December 1st - Duncan Financial Group: Support where you need it for your practice

December 8th - The Power of FlexGuard Income by Prudential

December 15th - Wealthbox CRM: Going over the features and simplicity!

December 22nd and 29th - No calls scheduled. **Happy Holidays!**

Thank you to those who joined us at Cambridge Ignite!

until next year
ignite 2021 recap

CAMBRIDGE
ignite

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:

Annual Renewal Invoices

- 2022 Annual Registration Renewal Invoices will be available in the Registration Renewal section of the CLIC® dashboard on or around November 16, 2021
- You will be required to review the states listed on your invoice and verify the states in which you need to be registered for 2022
- Note that any requests for full terminations effective December 31, must be submitted to the Registration and Licensing Team no later than December 14, 2021

Paycheck Protection Loans

- The receipt of a Paycheck Protection Program (PPP) loan in and of itself does not require disclosure as an Outside Business Activity (OBA). Any entity receiving such a loan would need to be disclosed to Cambridge. If you have received a PPP loan in the name of an entity not disclosed to Cambridge as an OBA, you should immediately submit an OBA for that entity (cir2.com > Tool Grid > OBA)
- Forgiveness of a PPP loan, or any part of a PPP loan, consistent with the original terms of the loan, is not considered a “compromise with creditors” and is therefore not reportable on Form U4. Any forgiveness beyond the original terms of the loan would be required to be reported

Investment Opportunities



Duncan Walsh Advisors

David Duncan, CFP

CEO and CIO

Duncan Financial Group, LLC

dduncan@duncangrp.com

Thomas J Walsh, CFA

President

Walsh Asset Management

TJWalsh@WalshAssetMgt.com

As a financial professional with Duncan Advisor Resources, you have exclusive access to our team directed models within WealthPort called Duncan Walsh Advisors. Listen in as the co-managers of the portfolio's give their view on the 3rd quarter



performance and the markets. All proposal requests need to be sent via email to dwaproposals@duncanar.com

Call Attachments

[About DWA](#)

[DWA Client Brochure](#)

[DWA 3rd Quarter Performance Summary](#)

[DWA Request for Proposal](#)

Larry L. Qvistgaard, II

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