

## Today's Rep Call

Click the button below to view the recording of today'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

**January 19th** - [The Horizon One Experience](#)

**January 26th** - [Interest Rates and Merger Arbitrage with Nexpoint](#)

**February 2nd** - [DWA 4th Quarter Review](#)

## 2022 Annual Branch Meeting

Please join us for the 2022 Duncan Advisor Resources Annual Meeting. We are pleased to host you at [Omni Orlando Resort at ChampionsGate](#) in sunny Championsgate, FL. This meeting is designed to meet the needs of our financial professionals and will offer educational sessions on products, marketing and sales, marketplaces trends, and more. Plus a backdrop of the beautiful sunsets.

Invaluable networking opportunities and captivating speakers await.

**Ready to Register?**

We have a dedicated website ready so you can reserve your attendance and also book your hotel!

**[Click here to reserve your spot](#)**

## Compliance

Thank you for joining last week's "2021 in review" edition of our call - to watch a recording, click [here](#)

Reminders:



## Correspondence due

### Updates: 2022 branch visits

- You do have the option to do a virtual branch visit this year if you have COVID concerns. Coordinate with your OSJ

### New Cambridge Source offering

- Cambridge Source is now offering technology services in addition to their other capabilities. Click [here](#) for a detailed description of assistance they can provide, and for more information about how to get started, contact Cambridge Source ([cambridge.source@cir2.com](mailto:cambridge.source@cir2.com)) at 800-777-6080.

When using the program there is a monthly subscription or an as needed subscription:

- The month to month subscription is \$170 per month for 3 hours of service. After the 3 hours you are billed at a discounted rate of \$55/hr. Includes a subscription to the cybersecurity offering
- The as needed rate for the program is \$100/hr for all of the services above. Billed in 6 minute increments

### DOL PTE January 31 requirements

- Cambridge financial professionals will meet the January 31 requirements using the current CLIC BIA process and additional documentation in your client files. The January 31 disclosure requirement will be met through the updated disclosures outlined above with no additional action required.

## Practice Management



### Horizon Investments

**Arvin Shiribabadi**  
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**Brad Stoehr**  
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Financial Professionals are extremely busy these days and time is money. Keeping up with your created portfolios can seem daunting but important to be on top of so your clients know you're looking out for them. Horizon Investments has a program call Horizon One that is focused on empowering your independence. Our goal is to provide customized and objective investment research to enhance your current process.

#### Speaker Attachments

[Horizon One Service Offerings](#)  
[Sample Service Offering](#)  
[Consulting Flyer](#)

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Making It All Work Together

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