Weekly Rep Call

2/2/2022

Duncan ADVISOR RESOURCES

Making It All Work Together

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

February 9th - Capital Group: 2022 Market Outlook & Prospecting 401K's in this market
February 16th - Brinker Capital: Direct Indexing and Tax Managed Solutions with Appreciated Securities
February 23rd - Dunham: Selling a highly appreciated asset & deferring taxes for 20 years
March 2nd - Managing your Tax-Efficient strategies with SEI
March 9th - Franklin Templeton: Getting to know the new FT and our Alternative Strategies
March 16th - Asset Map: Simplified Financial Planning At Your Fingertips

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

CJ's Compliance Corner

Reminders:
PTE

No additional action needed as part of January deadline. Once it has been released, we will be demonstrating how to use the RightBridge tool on a future rep call, so stay tuned for more!

Updates:
Tax mailings

Tax mailing dates are now available for both Pershing and FCCS/NFS

Pershing 2021 Tax Mailing Dates

Fidelity Institutional® 2021 Tax Mailing Dates

Mobile App Enhancements

• Password reset is a self-service feature that will be available in the Wealthscape Investor mobile app on February 15, 2022.
• This feature will enable end investors to reset a forgotten password directly in the mobile app. Previously this feature was only available via the browser.

Updates to WealthPort forms

These are material changes, the WealthPort Wrap Client Agreement and Application version dated 102221 will continue to be accepted through March 1, 2022. As of March 2, 2022, the WealthPort Wrap Client Agreement and Application version date 020122 will be required and the older version dated 102221 will no longer be accepted

Around the Product Block

Upcoming Cambridge Webinar - New Custodian Option for WealthPort Advisor Directed Accounts

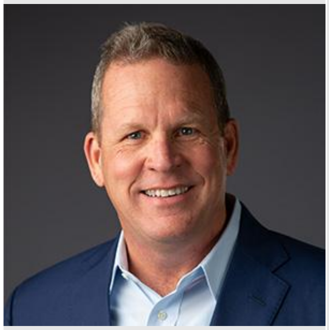
Cambridge continues to expand and enhance WealthPort®, enabling you to deliver solutions for your clients, at any stage of life, and every size of account. Fidelity Institutional Wealth Services (FIWS) as our newest custodian option for WealthPort Advisor-directed business. If you would like to learn more about the WealthPort Advisor-directed Custodian offering with Fidelity, please register for a webinar here, or contact our Advisory Solutions team at advisory.solutions@cir2.com

Investment Opportunity

Duncan Walsh Advisors

David S. Duncan, CFP
Managing Partner & Chief Executive Officer
dduncan@duncangrp.com

Thomas J. Walsh, CFA
Managing Partner & Chief Investment Officer



tjwalsh@walshassetmgt.com

As part of your affiliation with Duncan Advisor Resources, you have access to 14 model investment portfolios through Duncan Walsh Advisors. Listen in as we do a recap of the 4th Quarter performance and items the Investment Policy Committee is keeping an eye on.

Speaker Attachments
4thQuarter DWA performance
DWA Risk Tolerance Questionnaire
DWA Request for Proposal

Larry L. Qvistgaard, II
President, COO
Duncan Advisor Resources
215 Avenida Del Mar, Ste. B, San Clemente, CA 92672
T 800.517.9901 x2230 **C** 949.306.0060 **F** 707.676.8633
www.duncanar.com

Duncan ADVISOR RESOURCES
Making It All Work **Together**