

## 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

**March 23rd** - [Preview of DAR Branch Meeting](#)

**March 30th** - [No Call due to Branch Meeting](#)

**April 6th** - [TBD](#)

**April 13th** - [Russel Investments: Inflation Concerns and the Case for Real Assets](#)

## 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

**Updates:**



### CLIC enhancements

- A planned release in CLIC was completed successfully on March 8. This release allows users to navigate directly to the CLIC home page from the Tool Grid on cir2.com. The Dashboard is still available in the Control Center (left hand menu in CLIC)

### Upcoming Updates — Chrome, Firefox, and Microsoft Edge

- Impact — When each platform's major version number goes from two digits to three (99 to 100), some older websites may no longer display correctly. Applications may experience errors, or inability to access certain sites.
- Mitigation Plan — The Cambridge Technology Team has conducted analysis to identify impacted applications, and is taking measures to reduce or eliminate impact. The team is also working with Cambridge third party integration partners to address any compatibility issues and provide support as needed.
- Timing — Google Chrome is expected to upgrade to Version 100 on March 29 with Microsoft Edge to follow on March 31. Firefox is expected to release its Version 100 update on May 3.
- If you have any questions or concerns, please contact Cambridge Source Technology Services ([sourcetechsupport@cir2.com](mailto:sourcetechsupport@cir2.com)) at 800-777-6080

### Reminders:

#### Hearsay for texting

- Hearsay is hosting a webinar on March 24. Register today to learn how you can add a delegate to your Hearsay Relate Texting Platform and how they can support you with building program efficiencies, driving engagement, and scheduling

March 24, 2022 | 11:00 a.m. – 11:30 a.m. CT | [Register here](#)

#### 2022 firm Element credits

- Remember that attending sessions at the branch meeting can satisfy your elective firm element credits. Attending the annual compliance meeting on Friday will satisfy your 2022 ACM

## Around the Product Block



### Review of Sponsors for the 2022 Branch Meeting

We have 21 total sponsors for this year's meeting. Companies like Horizon, Prudential (Annuities and Life Insurance), Inland, Capital Group, Delaware are going to be there to offer ideas and strategies to help your practice. This is a great **opportunity** to learn something new, add a new revenue driver, and even network with other FP's in our branch who can help you.

Take the time to meet them all.

## Practice Management



### Asset Map

**Jack Kerr**  
Senior Advisor Solutions Manager  
[jack.kerr@asset-map.com](mailto:jack.kerr@asset-map.com)

Asset-Map is a SaaS solution that provides financial advisors with a

dynamic and highly effective client engagement process along with tools for client profiling. It has positively impacted the advice and sales experience for thousands of financial professionals and improved the decision-making process for hundreds of thousands of households to date.

The Asset-Map solution guides in-person or remote client meetings to verify and explore the current household financial condition and decisions. It is often the foundation of a review meeting agenda and enables the financial professional to address the suitability of financial decisions and introduce appropriate strategies into the discussion.

**Duncan Advisor Resources financial professionals get 24% off the cost.**

**For a 15 minute call on this, click here - [15-min Asset-Map catch up](#)**

**Speaker Attachments**  
**[Demo Deck Presentation](#)**  
**[Advice Starts Here](#)**  
**[Visualize the Possibilities with Asset-Map](#)**

---

**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](http://www.duncanar.com)



Securities offered through Registered Representatives of Cambridge Investment Research, Inc., a Broker/Dealer, Member FINRA/SIPC.

Advisory services offered through Cambridge Investment Research Advisors, Inc., a Registered Investment Advisor. Duncan Advisor Resources and Cambridge are not affiliated.

The information contained in this email is confidential and is intended solely for the addressee. If you are not the intended addressee and have received this email in error, please reply to the sender to inform them of this fact.

**DUNCAN ADVISOR RESOURCES | 311 Main Street Irwin, PA 15642**  
**[www.duncanar.com](http://www.duncanar.com)**

