

# Weekly Rep Call

4/06/2022



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

**April 13th - Russell Investments: Inflation Concerns and the Case for Real Assets**

**April 20th - Lord Abbott**

**April 27th - Prudential**

**May 4th - Tentatively DWA**

**May 11th - Duncan Advisor Resources BGA**

## Branch Meeting Follow-up

Thank you to all who joined us in Florida for this year's branch meeting! Recorded sessions and photos from the event will be available on the Duncan Advisor Resources website soon. If you have any photos you would like to share, send them to [Jon Michael](#)

## CJ's Compliance Corner

### Updates: E&O Policy Renewal

- If you are interested in increasing your coverage at renewal, the deadline to submit applications to Cambridge is May 20, 2022
  - Click [here](#) for coverage options and applications
- Active financial professionals will receive their updated E&O certificates through email directly from AON between June 1



- 2022 – June 15, 2022. Many financial professionals overlooked this email last year as they believed it to be spam. Please keep an eye out for the email from an @aon.com email address
- For questions, please email [E&O@cir2.com](mailto:E&O@cir2.com)

## Best Interest Analysis Form

In preparation for compliance with Department of Labor Prohibited Transaction Exemption 2020-02, client signature lines have been added to the Best Interest Analysis form, however client signature will not be required on this form until June 30

## Alternative Investment Disclosure

New forms are now live - check the bottom left-hand corner for version (current version is \_030122)

## Around the Product Block



### Admin to Admin Call

April 12 | 3:00 p.m CT

**Operations PSMs: Where Are Things Getting Stuck**  
During this session, we will share the most common places paperwork is getting held up, and what you can do about it

[Register here](#)

### Pacific Oak Update

Pacific Oak's new offering has been accepted by Cambridge, so be on the lookout for AI Insight training and additional information soon

## Investment Opportunity



### Asset Map

**Brad Stoehr**  
Central Divisional Director  
[brad@horizoninvestments.com](mailto:brad@horizoninvestments.com)

At its core, goals-based investing is about connecting investment strategies to a client's financial objectives. Horizon empowers advisors to make that connection by custom-tailoring strategies for the three stages of an investment journey: Gain, Protect and Spend

### Speaker Attachments

[Index Methodology](#)  
[Horizon Ascend Brochure](#)

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