Weekly Rep Call

4/06/2022

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

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

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

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 | 311 Main Street, Irwin, PA 15642