Weekly Rep Call

4/27/2022

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

May 4th - DWA 1st Quarter Review

May 11th - Duncan Advisor Resources BGA

May 18th - CreativeOne

May 25th - CNR Speedometers

June 1st - First Trust

June 15th - Inland

June 8th - FS Investments

June 29th - Apollo (Formerly Griffin)

Branch Meeting Follow-up

A survey from Larry was sent to your email last week for those that attended the Branch Meeting. Please take the few minutes to complete that survey.

CJ's Compliance Corner

Updates:

Form ADV

Cambridge has released FAQs to assist with client contact in relation to the recent letters sent about the ADV update prompted by the SEC litigation. Below are the resources currently **available:**

- Clients with Pershing and NFS accounts will see a statement message in their March account statement. click **here** to view the statement message
- Other clients will receive a copy of the letter available **here**
- Cambridge talking points available **here**

If you have any questions, please contact Fiduciary Services, Advisory Compliance: advisory.compliance@cir2.com or 800-777-6080 ext. 5705

Tennessee Privilege Tax

Cambridge will remit the payment of the $400 Privilege Tax to the state on your behalf and collect the $400 payment from your compensation

To prevent overpayment, please notify the Registration and Licensing Team at licensing@cir2.com before May 15, 2022, if the Privilege Tax has already been paid for 2022. If the Registration and Licensing Team is not notified by May 15, 2022, Cambridge will remit the payment on your behalf and collect it from your compensation.

In cases where Cambridge was not notified prior to May 15, 2022, that the tax was already paid, an overpayment may exist and you would need to contact the Tennessee Department of Revenue directly to request a refund.

For questions, please contact the Registration and Licensing Team: (licensing@cir2.com) at 800-777-6080 x3341

Around the Product Block

1031's

Reps who are looking to recommend 1031s, may look at the Cambridge page and see nothing. That is not the case. All approved 1031s can be found on AI Insight. Click "Structure" on the left hand side and check the box 1031. Search and you will see approved options.

Cutting down your VAD/FID Disclosure NIGO's

Recently, I stumbled onto Expense Analyzer & Forms found within the Morningstar Annuity Intelligence tool. Watch today's video to see how to access it and how it can work to reduce common Not In Good Order's from our team.

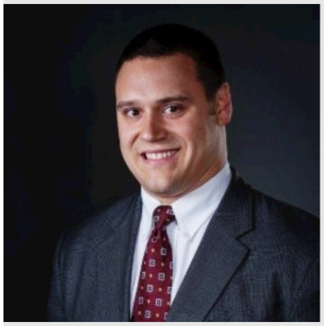
Duncan Advisor Resources Financial Planning

The new webpage detailing our Financial Planning program available to you, is now up and running. Click this link to see it. Great work Kristen and Stacy for bringing this together for our Enterprise.

New CLIC eSignature program added

iM Global Partners is now accepting CLIC® eSignature on paperwork from Cambridge financial professionals, and that Cambridge is now accepting iCapital eSignature on sponsor paperwork from Cambridge financial professionals. Details of this update can be found here

Investment Opportunity



Prudential Annuities

Matthew Longo
National Sales Desk Manager
matthew.longo@prudential.com

In the 20 minutes, we'll aim to cover the following for your group:

1. A quick recap of the FlexGuard platform, both on the accumulation and income sides. Specifically we'll focus on client profiles for the broader platform.
2. An idea, centered on RMDs with the FlexGuard income platform that has started to gain traction within the system.
3. Answer questions your group has about the platform or the idea itself

Speaker Attachments
FlexGuard Income Income Rates
FlexGuard Income Strategy Rates
Sample Illustration

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