

# Weekly Rep Call

5/25/2022



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

**June 1st - First Trust**

**June 8th - FS Investments**

**June 15th - Inland**

**June 22nd - Pacific Oak**

**June 29th - Apollo (Formerly Griffin)**

**July 6th - No Rep Call. Take the day to BBQ**

**July 13th - Bluerock**

**July 20th - Stepstone/Conversus**

**July 27th - Sierra Investments/Ocean Park Asset Management**

## LQ's Compliance Corner & Around The Product Block

### Recent Cambridge Announcements

Read the latest about [Pershing's Abandoned Property Management](#) and their [increase ACH deposit limit to \\$1,500,000](#)



## DOL PTE Implementation, what to look out for VAD/EAID Updates

### DOL PTE

1. June 30th begins enforcement of DOL-PTE. It is imperative that you plan now for upcoming trainings on proper paperwork and documentation. Upcoming June sessions are either on Tuesday's at 2pm CST or Thursday's at 10am CST. [Register now](#) for Tuesday or [Register now](#) for Thursday.
2. VAD/EAID: For subsequent purchases these disclosures are NOT REQUIRED if the amount is less than \$5K for non-qualified annuities and less than the IRS contribution guidelines for qualified registration types. Any other amount, please provide a Source of Funds form



### OneAmerica Repricing

OneAmerica announced a rate reduction in their Care Solutions line of 8-15%. As a reminder, Care Solutions is their asset based long term care program built on their whole life or annuity chassis. If you're engaging clients in discussions on how to finance potential long term case costs, this is an excellent time to reach out to our insurance brokerage general agency. [Email Robb Stottlemeyer](#) for more information

### Estate Planning For Women Webinar

The Cambridge Community of women is hosting a webinar on June 1<sup>st</sup> at 1pm CST for a discussion on Estate Planning for Women. Registration link is [here](#)

### Guaranteed Income in the DC Plan Space Webinar

On June 6<sup>th</sup> at 3pm CST, the Cambridge Retirement Plan Academy will be hosting a webinar on understanding guaranteed income in the defined contribution space. Registration link is [here](#)

## Marketing & Investment Opportunity



### City National Rochdale

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CNR has many ways to help you and your clients during this volatile market. First, is the active tax management. Our approach uses a combination of methods – tax loss harvesting, asset location, strategic implementation, tax budgeting – to adjust to your needs.

Second, our Economic & Financial Indicators that help you discuss with your clients the different impacts that drive growth or

recession.

Third, our Comprehensive Wealth Assessment. A complimentary, holistic service offered in collaboration with financial advisors to supplement their existing client value proposition and help them attract, win and retain more UHNW clients.

Take a listen to our webinar from today -> [Investing in Turbulent Times – Assessing the Market Impact of Tailwinds and Headwinds](#)

### Speakers Attachments

[Intro to CNR](#)

[Investment Consulting Team](#)

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