

Weekly Rep Call

6/1/2022



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 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

Catherine's Compliance Corner



Rights of Reinstatement New Corrective Process

You may see an E-mail from Daniel Wright regarding one or more mutual fund transactions when clients may not have received discounts for which they were eligible at time of purchase. If you receive one of these messages, please reach out to Todd Clark [CC larryq@cambridgesecure.com] for more information about the impacted transactions. And for more

Catherine's Compliance Corner



DOL PTE Implementation

Please see the [DOL Prohibited Transaction Exemption 2020-02](#) landing page on CIR2.com for the latest information on implementation processes and important dates.

- Register now for a session on Tuesday at 2:00 p.m. CT. Available sessions include:
 - June 7, 14, 21, 28
 - July 5, 12, 19
- Register now for a session on Thursday at 10:00 a.m. CT. Available sessions include:
 - June 9, 16, 23, 30
 - July 7, 14, 21

E&O Insurance Pricing

The pricing for our renewing E&O coverage has been announced. See the [full page](#) on CIR2.com for more detail

Around The Product Block



New eSignature Investment Company added

Beacon Capital Management is now accepting CLIC® eSignature on paperwork from Cambridge financial professionals.

Upcoming Webinar

Strategic Cash Investing in Volatile Markets: investors must now navigate a 40-year high in inflation, rising interest rates, geopolitical risks, and lower economic growth projections. [Click here to register](#) for this insightful webinar by T. Rowe Price on June 8th at 3pm CST

Important changes with legacy Ivy Funds

By the end of second quarter 2022/early third quarter 2022, the transfer agent for the Legacy Ivy Funds will transition to Delaware Investments Fund Services Company. As part of this conversion, fund account numbers may change. If an account number does change as a result of the move to BNY Mellon, it will be directly communicated to you by Delaware Funds as they get closer to the transfer agent conversion.

Investment Opportunity



First Trust Advisors

Chris Hodgdon

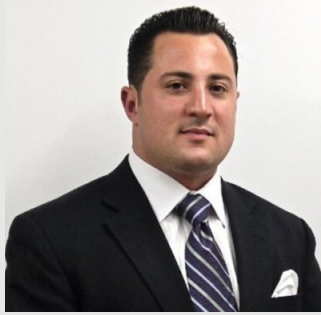
Vice President First Trust ETFs

Email / CHodgdon@ftadvisors.com

Doug Bottaro

Vice President First Trust UITs

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With many economic headwinds being discussed daily, the midterm election is essentially five months away. History shows how the market reacts before and after the election and now is a good time to position clients for this. Listen in as First Trust reviews this historic data, the benefits of using UITs and other great information you can use with your clients today.

Speakers Attachments

[Client Resource Kit - Midterm Elections](#)
[Wholesaler List](#)

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