

Weekly Rep Call

6/29/2022



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

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

July 13th - Stepstone/Conversus

July 20th - Bluerock

July 27th - Sierra Investments/Ocean Park Asset Management

Practice Management Series

August 3rd - Duncan Financial Planning

August 10th - New Age Alpha H Factor System

August 17th - DWA 2nd Quarter Review

Technology/Fee Updates



With updates and changes involved in the Cambridge digital transformation, an increase in the technology fee will be coming this summer. For a detailed breakdown of the [announcement](#), [watch the recording \(With Colleen Bell and Nick Graham\)](#), and reference the resources linked below:

- Check out the [digital transformation page](#) for timelines, user guides, recorded webinars, and more!
- Sign up for beta testing [here](#)



Updates: DOL PTE implementation

June 30, 2022 is the final enforcement date for the DOL Prohibited Transaction Exemption (PTE) 2020-02 rule

Requirements based on signature date:

- Client Information and Suitability Form or accompanying transaction document (i.e. ACAT) signature date is July 1 or after, BIA or RightBRIDGE Product Profiler form submitted for new accounts
- Client Information and Suitability or accompanying transaction document (i.e. ACAT) signature date is June 30 or prior, the BIA in the CLIC interface will be accepted and a form will not need to be uploaded

For more helpful reminders & FAQs, click [here](#)

Use the below links to register for educational webinars:

RightBridge

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

Annuity Wizard

- **Register now** for a session on Tuesday at 10:00 a.m. CT. Available sessions include:
 - July 5, 12, 19

Compliant client communication

With increased scrutiny on different methods of contacting clients, it is increasingly important to only communicate with clients using the approved platforms. Options for compliant texting are available, and detailed [here](#). As a reminder, these are the only solutions for business texting that are approved by Cambridge

Around The Product Block



Two new Traditional Alternative Investments added

Cottonwood Community Multi Family REIT and Inland Student Housing Opportunity Zone was added to the Cambridge Traditional Alternative Investment platform in the last week. To learn more, click the following links to see more: [Cottonwood](#) [Inland](#)

Upcoming Virtus Market Webinar June 30th 3pm CST

This Mid-Year Update will be hosted by Virtus Chief Market Strategist Joe Terranova who will serve as the moderator for a panel made up three of our Investment Partner Chief Investment Officers. In a fast paced format, they will recap some of the biggest themes of the first half of the year and lay out the headwinds and

tailwinds for the remainder of 2022. Our objective is to provide advisors with valuable perspective on the capital markets and to also showcase the expertise of our investment panel and the strategies they represent. [Click this link to register today](#)

Investment Opportunity



Apollo Global Management, Inc.

Brady Gallagher

Divisional Sales Manager

Email Brgallagher@apollo.com

During his presentation, Brady will focus on the Apollo Global investment platform, its history and track record, as well as the benefits of investing with a proven institutional firm. Brady will also touch upon commercial real estate in a rising rate environment and provide updates for the Apollo Diversified Real Estate Fund. Lastly, Brady will touch on Apollo becoming the new advisor to the Credit Interval Fund and how the portfolio will be allocated moving forward.

Speakers Notes

[Speaker Bio](#)

[Apollo Real Estate Fund](#)

[Apollo Diversified Credit Fund](#)

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



Making It All Work Together

Securities offered through Registered Representatives of Cambridge Investment Research, Inc., a Broker/Dealer, Member FINRA/SIPC. Advisory services offered through Cambridge Investment Research Advisors, Inc., a Registered Investment Advisor. Duncan Advisor Resources and Cambridge are not affiliated.

The information contained in this email is confidential and is intended solely for the addressee. If you are not the intended addressee and have received this email in error, please reply to the sender to inform them of this fact.



Duncan Advisor Resources | 311 Main Street, Irwin, PA 15642

[Unsubscribe ppizarro@duncangrp.com](mailto:ppizarro@duncangrp.com)

[Update Profile](#) | [Constant Contact Data Notice](#)

Sent by larryq@cambridgesecure.com powered by



Try email marketing for free today!