

Weekly Rep Call

7/20/2022



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 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

August 24th - Kristen Civin, Cambridge Practice Management

August 31st - Heather Becklund, Cambridge Director of Client Solutions to discuss Bamboo

September 14th - DWS: LinkedIn Prospecting and PortfolioIQ

Cambridge Ignite

We interrupt reading about your favorite topic DOL PTE, to remind you that Cambridge Ignite is less than 70 days away!!! Join us in the Lone Star State September 21-23 for Ignite 2022 at the Gaylord Texan Resort in Grapevine, Texas. This is the perfect time to secure your airline before the flights get full. By registering now, this will help us plan effectively for the Thursday night Enterprise dinner.

[Click here to register for Ignite.](#)



Updates: Multiple items within your Trade Key

With the increase in trade key's as well as activity from the supervision team in regards to DOL PTE, best practice is to get into trade review at least once per day. Also with complicated transactions like Alternative Investments and Annuities, there might be multiple items that need to be addressed before a review can be completed. So please review all requests and make sure they are addressed before sending back to Direct Supervisor. Logging into Trade Review is easy:

1. from cir2.com along the black bar at the top, click CLIC
2. In the new browser window on the left menu, click Trade Review
3. On the top bar over over Review and click Trade Summary

U4 update reminder

FINRA requires every Form U4 be kept current and accurate at all times by filing amendments for all outside business activities (OBAs), changes of address, and disclosure events. Items must be reported to the Disclosures and Dispute Resolution Team promptly to comply with FINRA's 30-day filing requirement. FINRA imposes fines of up to \$1,575 for late filings. OBAs require preapproval by Cambridge and must be submitted by scrolling to the OBA tab at the top of the cir2.com home page.

Around The Product Block



BIA Tech issue

We have observed BIA's submitted for review, have had the incorrect box checked when it comes to cash only contributions. The system would mark the box above. CLIC Tech is aware of the issue and if we can easily determine that the source of funds is cash, we will review as normal. Be on the lookout for emails or phone calls if we are unable to determine that.

Cambridge New Recruit Bonus

Effective TODAY!!! Any new recruit referral into our enterprise, will earn you a 4% referral bonus. Here's how it works:

1. If your referral joins Cambridge, you will receive **two percent of their anticipated annual revenue** as a credit on your next compensation statement after their FINRA join date.
2. After they've been with Cambridge for 12 months, you'll get **two percent of their actual annual revenue** paid in the 13th month!

The promotional four percent referral bonus ends December 31, 2022. Leads must be submitted to me by December 31, 2022, and join within 12 months of the referral date to qualify for the four percent promotion. \$50,000 maximum total reward per referral.

Investment Opportunity



Daniel Church

Senior Regional VP- Mid-Atlantic

Email dchurch@bluerockcm.com

As market volatility continues, many of your clients are looking for an option to stabilize their portfolio. Many of you are familiar with our Total Income Real Estate product, but we recently launched two new options on the Cambridge platform. Tune in to hear how the new common and preferred stock offerings work, the latest on our Total Income product, and recent data on this sector.

Speakers Notes

[BIG Common Stock Offering Overview](#)

[BGR Preferred Stock](#)

[Bluerock Industrial Growth REIT](#)

[Q2 Total Income RE Fact Sheet](#)

[Institutional RE Bar Chart](#)

[Wholesaler Map](#)

[Bluerock white paper](#)

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



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 marketing@duncangrp.com](mailto:marketing@duncangrp.com)

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

Sent by larryq@cambridgesecure.com powered by



Try email marketing for free today!