

Weekly Rep Call

8/3/2022



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

Practice Management Series

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 7th - HealthView Services

September 14th - DWS: LinkedIn Prospecting and PortfolioIQ

September 21st - No Rep Call - Ignite

September 28th - Client4Life

October 5th - Precise FP

Cambridge Ignite

We interrupt reading about your favorite topic DOL PTE, to remind you that Cambridge Ignite is less than 50 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.](#)

Looking for a way to defray the costs of Ignite? You may have qualified for conference credits based on your production from October 1, 2020 to September 30, 2021. Click [this link](#) to see the breakdown

CJ's Compliance Corner



Most common PTE NIGOs

- Best Interest Analysis completed in CLIC, but not included in paperwork submission for transactions.
 - For DOL PTE, Cambridge now requires that the BIA form be generated and submitted along with the rest of the documents into WebCapture
- Fee information not being included with the BIA form when a rollover is being done.
 - Cambridge allows us to submit the BIA & fee details instead of using the RightBridge product profiler, but remember to include supporting documentation (such as a form 5500) when bypassing RightBridge

Around The Product Block



Virtus Fund Changes

Effective July 25, 2022, AllianzGI U.S. will no longer be a subadviser to Virtus Funds. The current subadviser, Allianz Global Investors U.S. LLC. will be removed as subadviser of the listed impacted funds, and accordingly, all references to AllianzGI U.S. as subadviser to the fund will be removed from the fund's prospectuses. See the [full list of impacted funds](#) including new manager information

Lord Abbett Share Class Conversions

Recent updates to Lord Abbett's mutual fund share class availability have now allowed the Lord Abbett I share to be eligible for selection as the preferred share class for managed accounts. In the coming weeks, along with the Quarterly Managed Account Conversion Cycle, accounts at Pershing and National Financial Services LLC (NFS) eligible for conversion will be converted from the Lord Abbett F share to the I share when the I share is available for the fund.

Financial professionals affected by this conversion will receive a notification indicating you have accounts included in the conversion cycle. The intended timeline for the next conversion cycle submission to Pershing and NFS is August 8, 2022.

WealthPort Fee Calculator

Based on feedback from financial professionals, Cambridge is pleased to introduce a new and enhanced version of the WealthPort® Fee Calculator. The upgraded calculator is now available to all Cambridge financial professionals

in [WealthPort](#) under the 'WealthPort Resources' tab. The tool is designed to assist in the calculation of WealthPort fees, and in comparing program types or investment options.

Transamerica Rider Enhancements

They have improved [Transamerica Income Edge](#) 1.2 and [Transamerica Principal Optimizer](#) living benefits. Both offer enhanced features and are available with a Transamerica variable annuity for an additional fee.

Spotlight on Success

Last month, we launched the Spotlight on Success exclusively on LinkedIn. To see July's featuring Alex Kline, [click here](#). To see Episode 2 featuring Adam Parks, please [click here](#). Please share these to your network.

Practice Management



Duncan Advisor Resources - Financial Planning

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Let us be your wingman or pilot

Thinking of how to incorporate Financial Planning into your practice? Join Kristen and Stacy from Duncan Advisor Resources as they share how planning has created both opportunities and success. They'll share their planning process and ideas to help provide value as you implement with your clients.

Details about our division can be found on the [Duncan AR Advisor Website](#)

Speaker notes

[Call Presentation](#)

[Subscription vs Planning](#)

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