Weekly Rep Call

8/24/2022

Duncan ADVISOR RESOURCES
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 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

October 12th - YourEfolio (Estate Planning Software)

October 26th - Samantha Russell: FMG Suite/20Over10 - Marketing You!

Cambridge Ignite

Final reminder on Cambridge Ignite!!! 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

Updates:
Firm Element

Three of the five requirements are now available for completion, now accessed via RegEd. This year's courses do not contain electives, and must be completed online

The annual compliance meeting will be added at a later date, and those who attended the branch meeting live will receive credit

Reminders:
Smarsh Encryption

Remember to insert a space between your encryption word and other words in the subject line of your E-mail

BIA form

Be sure to check for blank areas that may not have been auto-filled from CLIC. Also, are YOU marking the appropriate box in Section 7? The wording can be tricky, so watch the video for details!

Around the Product Block

New Annuity Product and Compensation Spreadsheet

This week, The insurance product team released the newest updates to the **Annuity/VUL Product** and **Compensation list**. This update will make it easier for you to see what's available on the Cambridge shelf and the compensation option to pick. As this list will get updated frequently, it is best to click the link under **Annuities** on CIR2.com and then click one of the product options to access the list.

WealthPort Plan and Propose Enhancements

Proposal and Research enhancements were made this week to the tool. **Click this link** to learn more.

Cambridge Digital Transformation Webinar

On August 30th at 2pm CST, Nick Graham and Colleen Bell will host this all-new session to share updates around our Digital Transformation initiatives., such as CLICNew!, which includes a new Dashboard, Account Open Experience, and Supervision; WealthPort® Digital Investing — our new small account solution; and more. To register, **click here**.

Practice Management

Cambridge Investment Research - Practice Management

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Your affiliation with Cambridge comes with many great resources especially within Practice Management. Join us as we welcome Kristen and Rachel to our call to discuss the many programs available from Cambridge that can help you grow your business as well as increase efficiencies.

Speakers Notes
Enterprise Executive Tasks Map
Advisor Problem Statement
PM Brochure
PM Interest Card
Enterprise Executive Cross Training Matrix
Advisor Initial Client Value Stream Map
Enterprise Executive Problem Statement
Enterprise Executive Gantt-Action Plan

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