Weekly Rep Call

Duncan
ADVISOR RESOURCES
Making It All Work **Together**

9/7/2022

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

September 14th - DWS: LinkedIn Prospecting and PortfolioIQ

September 21st - No Rep Call - Ignite

September 28th - Client 4 Life

October 5th - Precise FP

October 12th - YourEfolio (Estate Planning Software)

October 19th - MyRepChat

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

Branch Meeting 2023 Save the Date

As announced on the rep call a couple weeks back, our annual branch meeting has dates and location secured. Please mark on your calendar March 15-17th 2023 at The Omni Orlando at ChampionsGate. We look forward to seeing you there!

CJ's Compliance Corner

Reminders:
Positions of trust on client accounts

Financial professionals usually will not act in a fiduciary capacity (e.g., trustee, executor, trust protector) for a client's account unless the account is for a relative of the financial professional. Financial professionals acting in a fiduciary capacity must submit an outside business activity for the fiduciary role. Exceptions to act as a fiduciary for a client who is not a relative requires the approval of Compliance through the OBA Engine

Best Interest Analysis Fee Disclosures

Remember that in Section 7 (fees and expenses), the box for "Commission paid by fund/product company" should **only** be selected when the product is an annuity, VUL, or C-share

Around the Product Block

New eSignature firms added

On transitioning, new, and existing account-related paperwork **Cantor Fitzgerald & Co.** will accept electronic signatures gathered using Cambridge's DocuSign-based system. Please continue to follow the usual trade approval procedures and mail, fax, or upload eSigned paperwork with the Certificate of Completion directly to Cantor Fitzgerald & Co. upon supervisor approval.

Ignite Agenda

Your Ignite Agenda **has arrived!** Take a moment to begin planning your Texas trip today.

Practice Management

HealthView Services - Social Security, Medicare, and Health Planning

Corey Dylengoski
Strategic Account Manager
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Founded in 2008 by a team of financial professionals, healthcare industry executives, and physicians, HealthView Services is the nation's leading provider of healthcare cost-projection software. Its portfolio of retirement healthcare-planning applications – which create comprehensive and reliable cost projections for 33 million users annually – is utilized by advisors, financial institutions, employees, and consumers across the country. The firm has developed several software applications that address healthcare cost projections, long-term care costs, Medicare premiums and surcharges, Social Security optimization, and other retirement-planning factors. These tools give financial services' clients individualized and actionable savings solutions aimed at funding customized healthcare-cost projections.

Speakers Notes
Retirement Healthcare Costs Data Report Brief
HVS Portal One Pager

HVS Portal Signup Instructions
1. Got to https://portal.hvsfinancial.com/
2. Under "Don't have an account yet" click "Register Now for 7 day free trial"
3. Check off that you have an invitation code
4. Enter CAMB001
5. Complete registration using business email address

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