

# Weekly Rep Call

9/28/2022



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

**October 5th** - Precise FP

**October 12th** - YourEfolio (Estate Planning Software)

**October 19th** - MyRepChat

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

**November 2nd** - Cambridge: Cyber Security Tools for FPs

**November 9th** - FS Investments

**November 16th** - Riskalyze

**November 23rd** - 2023 Business Planning Bonanza

## 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!



### Reminders: Cybersecurity

- Compliant Texting - Cambridge currently offers two texting solutions. For more information, click [here](#)
- MFA now more important now than ever! If you have not yet enabled multi-factor authentication for Smarsh-surveilled E-mail, we will be reaching out to assist with the process

### Alternative Investments

- Regulators are targeting what appears to be "copy paste" language in client files, so using unique suitability rationale on disclosures will be an impactful best practice

### DOL PTE

- Remember to be documenting additional rationale or process in client file (client notes). The [investment wizard](#) is a great place to look for your consolidated documentation needs

## Around the Product Block



### New Pacific Oak Offering

Strategic Storage Growth Trust III, Inc. (SSGT III) is a private offering focused on growth-oriented self storage properties and related self storage real estate investments and approved for sale at Cambridge. This is a Regulation D offering which means its for accredited investors. For more information about the offering, please review the following [SSGT3 Brochure](#) [SSGT3 Portfolio](#)

### Using a QDRO with Married Couples

Most people associate a QDRO (qualified domestic relations order) with a divorce. What you may not know, is it can be a powerful planning tool for spouses. You can delay RMD's, avoid a pre-age 59 1/2 distribution penalty, and plan for Medicare/Medicaid. If you're interested in learning more, reach out to your Delaware Life wholesaler or contact me and I will find that person.

### Cambridge Referral Rewards 4%

Our enterprise is built on the best financial professionals like you. Cambridge knows that you can attract the best talent. From now until December 31st, 2022, you have the ability to get a 4% bonus on your referrals production.

- 2% on their verified production on their FINRA Day 1 with Cambridge
- 2% on month 13 based on their actual production for the first year

Please reach out to me with potential names you'd like discuss.

## Practice Management

### Client4Life Group, LLC

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With the ever increasing regulatory environment, Financial Professionals are being stretched even thinner to get revenue driving activities completed. What if there was a way to get a better handle on Client acquisition, communication, service, and retention affordably? Client4Life is that resource. Tune in to hear exactly how they do it and real data behind the increase in production they have provided Financial Professionals like you.

**If you're ready to take the next step, [click here](#)**

**Speakers Notes**

**[Client4Life Overview Brochure](#)**

**[Cambridge 3rd Party Vendor](#)**

**[C4L Presentation](#)**

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