Weekly Rep Call

8/31/2022

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 7th - HealthView Sciences: Social Security and Medicare Planning

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!

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:
DOL PTE

The RightBridge Investment Wizard is available for financial professional use, and now is a great time to give it a try! The live webinars are now over, however recorded sessions should be available soon. Once replays are accessible, we will share the link!

Reminders:
Trusted Contacts

When completing new account paperwork/entry into CLIC, be sure to mark the box next to "I decline to provide a trusted contact at this time." in situations where no trusted contact information will be entered. If an account is opened without a trusted contact and this box is left blank, it must be documented in the client file that the they do not wish to have a trusted contact added.

For more information regarding this regulation, please see the Cambridge announcement from last year.

Around the Product Block

CLIC NEW Dashboard and Account Opening

As communicated by Colleen Bell, all FP's have access to the new CLIC Dashboard. Listen in as I discuss how you can help make it better. For more information about this tool and what's to come, visit the **Digital Transformation page.**

Succession and Acquisition Webinar

Learn what lending opportunities exist for succession and acquisition planning through the Cambridge Succession and Acquisition Solutions team and our partner, LiveOak Bank. In either case, please Contact Larry if you want to explore this option. **Click this link** to register. The webinar is on September 8th at 10AM CST.

Retirement Plan Academy Webinar

On September 12th at 3pm CST, Join Nicole Hinman, Senior Director of Retirement Plans at Cambridge and Brandon Hansen, Retirement Plan Counselor with Capital Group, as we explore the art and science of plan reviews. Annual plan reviews are an essential part of supporting your plan sponsor clients and their participants, but they don’t have to be an overly onerous task to check off of your to-do list. To register, **click here**.

Cambridge Investment Research - Client Solutions

Heather Becklund
Director, Client Solutons
Email Heather.Becklund@cir2.com

Are you in need of targeted content campaigns to generate and nurture leads trough digital channels? What about fully automated workflows to eliminate the manual task of following up to nurture prospects? And how would you like this to be integrated into Clic? Well Bamboo can do this and more. Tune in as we go through this integrated marketing tool that is right at your fingertips.

Speakers Notes
What can Bamboo do
Getting Started

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

Duncan ADVISOR RESOURCES
Making It All Work Together

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.

Unsubscribe marketing@duncangrp.com

Update Profile |Constant Contact Data Notice

Sent bylarryq@cambridgesecure.compowered by

Constant Contact

Try email marketing for free today!