Weekly Rep Call

10/12/2022

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

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 Buisness Planning Bonanza

November 30th - Lord Abbett: Advanced Roth Strategies

December 14th - CreativeOne

Upcoming Compliance Deadlines:

10/15/2022 - Firm Element Training Due
10/31/2022 - Annual Compliance Questionnaire Due
11/15/2022 - Annual Compliance Meeting Due

To complete these, visit RegEd

CJ's Compliance Corner

Firm Element

Due by the end of this week!

If you attended the sessions at our branch meeting, you will be receiving credit for Books & Records as well as the Annual Compliance meeting. RegEd is currently working to update the system to reflect completion for those who attended.

Best Interest Analysis

NIGOs due to missing/incorrect BIA forms continue to be an issue in trade review. Remember to reach out to us with any questions you may, and if you are not sure if a transaction requires the form, just remember - when in doubt, fill it out!

Around the Product Block

Work Address on Cambridge Forms

As of October 11 in which the Client Employer Address field will be removed from CLIC as it is no longer required. The Client Information and Suitability Form and WealthPort wrap forms will also be updated to remove this field and released on October 18. Please contact the Partner Support Team with any questions.

Year-end Planning from Cambridge

Cambridge is offering bi-weekly webinars that cover frequently asked questions and assist with preparing for year-end.
To register for the trainings **click here**.

Cambridge Source Webinar

Join Cambridge for a special post-Ignite webinar where they'll discuss key takeaways from the conference with an emphasis on Cambridge Source offerings. What are a few of the programs financial professionals have been using the most? How can you continue to leverage the program to build your business?
The webinar is October 20th at 3pm CST
To sign up, **click here**

Practice Management

Your eFolio

Scott Huff
CEO
Email scott@yourefolio.com

Yourefolio is the only comprehensive estate and legacy planning platform for financial professionals. The platform provides all the tools for a financial professional to engage, plan, review, administer, and settle an estate.
The intuitive platform provides access to a network of attorneys for questions, reviews, and even to have documents delivered through the platform. From an estate analysis, federal and state tax projections, and complete illustrations, Yourefolio facilitates basic estate planning to the most advanced estates. Yourefolio is the

future of estate planning for financial professionals.

Cambridge financial professionals are eligible to receive a 10% discount for a monthly subscription and a 20% discount for an annual subscription.

Learn more:
https://yourefolio.com/features
https://yourefolio.com/product

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