

Weekly Rep Call

10/19/2022



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 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

November 30th - Lord Abbett: Advanced Roth Strategies

December 14th - CreativeOne

December 21st - No Rep Call

December 28th - No Rep Call

Upcoming Compliance Deadlines:

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

To complete these, visit [RegEd](#)

CJ's Compliance Corner



Firm Element Credits

We are still awaiting confirmation from Cambridge on when credits will be applied in the RegEd system. Pasted below is their latest communication, sent to us this morning:

We apologize for the inconvenience, however, there has been a delay in loading the credits into RegEd. We understand that this may cause individuals to show as overdue, however, we will be flexible in overdue requirements based on this issue. We will do our best to have them added as soon as possible.

Compliant Texting

Remember that client-texting is only approved through Hearsay or MyRepChat. For more information, or to enroll in one of the texting platforms offered at Cambridge, click [here](#).

SEC Marketing Rule

New guidance has been released regarding SEC marketing rule compliance. Click [here](#) for the updated and in-depth FAQs, and use [this link](#) to check out the latest special report!

Around the Product Block



4% Referral Bonus? 4% Referral Bonus!

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

Max Bonus \$50,000

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

Branch Meeting Sponsors

With the Branch Meeting scheduled March 15-17, if there are product sponsors that have expressed interest in getting involved, please send their information my way.

Practice Management

MyRepChat

Stacey Witty

Account Executive

Email Stacey.witty@ionlake.com

In today's environment, being able to communicate with clients and



your teams quickly and efficiently is becoming increasingly important. MyRepChat is a tool that supports business text messaging in a compliant form. Created for advisors by an advisor, MyRepChat is among our expanded menu of choices to help support your business and strengthen client relationships. MyRepChat is one of the texting solutions available on a complimentary basis for financial professionals with Cambridge.

Speaker's Attachments

[MyRepChat User Guide](#)

[Five Effective Texts](#)

Hearsay Transfer Information:

To transfer your number from Hearsay, we will need the below link completed and submitted. We will inform you when the transfer is complete and the number will be placed on your account. This process could take approximately two weeks.

<https://ionlake.com/cambridge-hearsay-to-myrepchat/>

The link below will launch you to helpful videos, a Start Up guide, and of course links to training and signing up.

<https://ionlake.com/cambridge-and-myrepchat/>

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