

Weekly Rep Call

11/23/2022



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

November 30th - Lord Abbett: Advanced Roth Strategies

December 7th - FS Investments

December 14th - CreativeOne

December 21st - No Rep Call

December 28th - No Rep Call

Upcoming Compliance Deadlines:

Important Registration Renewal Dates

November 15, 2022	Renewal invoices available from the CLIC [®] dashboard
December 13, 2022	Deadline for all registration changes, including notification of full terminations effective December 31, 2022
December 23, 2022	FINRA shutdown through January 2, 2023
January 13, 2023	Compensation debiting

Practice Management



Duncan Advisor Resources

Larry Qvistgaard, II
President, COO

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It's not too late to get your 2023 Goals and Plans in order! Watch the recording for for a 45 minute Zoom Session on Goals and Planning for your business. What I hope to accomplish from this short meeting will drive you to:

- **Develop your Purpose Statement – Why you do what you do**
- **Develop a list of Goals and Action Plans**
- **Develop a Marketing Plan**
- **List Monthly Objectives**

Larry L. Qvistgaard, II

President, COO

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