

# Weekly Rep Call

12/14/2022



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

**December 21st - No Rep Call**

**December 28th - No Rep Call**

**January 4th - Duncan BGA Year In Review**

**January 11th - Ashford Securities**

**January 18th - ACM Funds**

**January 25th - First Trust**

## Want to see any 2022 Rep Calls?

Of course you do!

Just click on this link <https://duncanar.com/securities/video-webinars/> and after you log in, click on Weekly Rep Calls and you have access to all calls in 2022. If you're feeling really bold, you can access the previous years too. It make a great holiday listening gift to the ones you love.

## Cambridge Update: Dedicated Service Teams

With our shift towards a dedicated service team model and adoption of those teams we will be implementing a new recording on the old Partner Support line, 866-866-5005, starting Monday (12/19). This message will inform the caller that Cambridge has shifted to a dedicated service team model and to ask a representative for more information. We wanted to proactively reach out and let

you know of this new message in case you have any offices that use this support line and have not been informed of the changes.

## CJ's Compliance Corner



### Returned Mail Process Change

Cambridge has planned a change to the way addresses are updated for clients. Please see the [announcement](#) for full details

### Independent Contractor Rule

New regulations could change the way we do business. For more information on the proposed changes to the independent contractor rule, check out the [alert](#) sent by Seth Miller

## Around the Product Block



### New Business Management Resources Page

Cambridge is pleased to offer an updated directory of Business Management Resources, featuring third-party approved offerings. The directory includes service providers for marketing/marketing automation, CRM, advanced planning, financial planning, specialized planning, research and reporting, video conferencing, shipping, and more. Most service providers in the directory offer discounted pricing as well as training and support for Cambridge financial professionals.

The new Business Management Resources section will be available under Business Resources > Managing Your Business Resources > Business Management Resources.

The redesigned directory complements all offerings available through Cambridge in addition to over 60 partners and product companies.

### Branch Meeting Sponsors

The Annual Branch Meeting is fast approaching. Make sure you have the dates marked off on your calendar March 15-17th. Our Main Stage sponsors are set but we have opportunities for other product sponsors to join. If you have product company you'd like to see, let me know.

### 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

## Business Opportunity



## CreativeOne - Team Tom

**Tom Mergan**

**VP, Annuity Sales**

Email [TMergan@creativeone.com](mailto:TMergan@creativeone.com)

**Sarah Williams**

**VP, Marketing Communications**

Email [swilliams@creativeone.com](mailto:swilliams@creativeone.com)

**Josh Haas**

**Business Development Director - FIA guru**

Email [jhaas@creativeone.com](mailto:jhaas@creativeone.com)

**Drew McDermitt**

**Business Development Director - RILA/Buffered Annuities  
Guru**

Email [AMcDermitt@creativeone.com](mailto:AMcDermitt@creativeone.com)

**Increasing your marketing presence and FIA/RILA  
knowledge**

**We have a great partnership with CreativeOne, an approved  
MGA with Cambridge. Tune in to listen to things to think about  
when it comes to your 2023 marketing plan and how to  
increase your annuity knowledge base with FIAs/RILAs.**

**Speaker Attachments**

**[Team Tom Contact Sheet](#)**

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