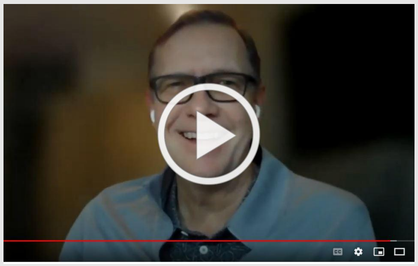
# Weekly Rep Call

1/4/2023

## 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

**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.

## 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, or listen to our previous rep call's recording

### Cybersecurity

Be on the lookout for the newest phishing attempts being made by

"DocuSign" imposters. The easiest way to ensure you are clicking on a valid link is to check the sender. You should see that you are receiving a message from DocuSign's genuine domain (e.g. dse@docusign.net) instead of: companyadmin880@icloud.com. For more information, see the alerts from us and from Cambridge

## AdView & Correspondence Systems

In continued attempts to improve and simplify the technology we use, Cambridge will be releasing a new way to submit marketing and correspondence. As a result, there will be blackout dates for submission, so be sure to keep an eye on the important dates that were announced on the most recent Compliance Alerts

## Annual CE Updates

Beginning this year, registered persons will be required to complete CE Regulatory Element annually by December 31 of each year. Additionally, CE participants will receive content tailored specifically to each representative or principal registration category that they hold. Please ensure you have created a FINPRO account, or you will not be able to complete this requirement.

The landing page for creation of a learning plan as well as launching your CE course can be found here

# Around the Product Block

## Upcoming Secure Act 2.0 Webinar

Within the Omnibus spending plan passed by Congress before Christmas, attached was Secure Act 2.0. Cambridge will be hosting a webinar January 24th at 3pm CST. For registration, please click here. If you want an in-depth look of what was in the bill, please click here

## New WealthPort Applications

With the addition of 3 new strategies, the WealthPort Wrap Client Agreement and Application and CAAP®1 and Unified Managed Account (UMA) Strategy Election Form were updated effective December 16th 2022. The older versions will continue to be accepted through January 16, 2023. As of January 17, 2023, the new version dated 12/2/2022 will be required and the older version will no longer be accepted.

## New Additional Signers Form

Cambridge has created the Additional Signers Form and it is now available to accompany both the Client Information and Suitability Forms, WealthPort Wrap, and WealthPort Custodian Applications.

The release of a more universal Additional Signers Form has allowed Cambridge to consolidate the previous three versions (Client Information and Suitability – Additional Signers Form, Client Information and Suitability Group Retirement Plan – Additional Signers Form, and Client Information and Suitability Trust/Entity – Additional Signers Form) into one and expand its use to WealthPort.

As a result, the Client Information and Suitability-specific Additional Signers Forms listed above will be retired as of December 16,

2022. The previous three versions will continue to be accepted until January 16, 2023. As of January 17, 2023, the Additional Signers Form will be required to ensure all necessary client information is captured for all primary investors, joint investors, custodians, trustees, authorized persons, executors, Powers of Attorney, or 529 beneficiaries on accounts.

## Business Opportunity

### Duncan Advisor Resources - Life Brokerage General Agency

**Jeffrey Barker**
**EVP, Life Brokerage Distribution**
**Email Jeffrey.Barker@duncanar.com**

**Robb Stottlemyer**
**Director of Life Brokerage Sales**
**Email robb.stottlemyer@duncanar.com**

**Increasing your revenue in 2023 with more Life and LTC sales**
We are kicking off the New Year on a topic that will increase revenue for your practice. By having direct access to a large Life Brokerage General Agency, you can be assured of getting top notch service and access to the best carriers on the street.

Listen to hear the latest news in the Life and LTC business, and a thank you for your 2022 partnership.

**Speaker Attachments**
Agenda
Equitable White Paper
Policy Review Flyer
DAR inforce illustration request
Policy Review Concept Kit
DAR Client Fact Finder
Life Policy Review 3rd party request
Life Policy Review Letter

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