

Weekly Rep Call

1/25/2023

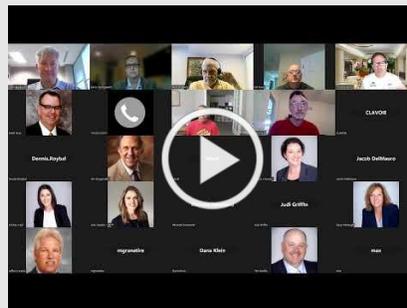


Making It All Work Together

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

Rep calls are happening every Wednesday (Except the week of the Annual Branch Meeting) and we are working hard to fill the schedule.

February 8th - AssetMark

February 22nd - Horizon

March 1st - United Life

March 15th - No Call

2023 DAR Annual Branch Meeting

**March 15th - March 17th at the Omni Orlando Resort
at ChampionsGate**

We've discussed it and provided dates, now is the time to **REGISTER** for the Annual Duncan Advisor Resources Branch Meeting

We have a dedicated website ready so you can reserve your attendance and **also book your hotel!**

[Click Here to Register](#)
[Click Here to Reserve Your Hotel](#)

Don't forget to register for BOTH!

CJ's Compliance Corner



Updates: Fiduciary Review Process

Cambridge has made a change to the way fiduciary reviews are processed. If you are selected for fiduciary review, you will now receive an E-mail notification that a case has been opened. This applies to advisory clients, and is a great reminder to keep good notes in your CRM whenever recommending a change, or recommending that no changes be made to a portfolio.

Reminders: Foreign Language Translation

Remember when planning to use material in a foreign language for use with clients, there is a Cambridge process that must be followed:

1. Material must be submitted to Compliance Advertising for review and approval in English. Submission should include details that the intent is to have the material translated to the agreed upon language.
2. Once approval is received, translation can be received from one of the two pre-approved vendors:
(<https://www.altalang.com> OR <https://www.universal-translation-services.com/>)
3. The certified translated version must then be submitted to Compliance Advertising along with the original English version and a copy of the certification of translation and reference to the previously approved tracking number.
4. Correspondence must be done in English. If the FP receives correspondence in a non-english language, they will be required to respond in English as well as pay to have the correspondence translated with one of the above vendors

Around the Product Block

Asset Map Landing Page for DAR

If your goal in 2023 is to do more financial planning but want to investigate other options, Asset-Map has created a dedicated landing page for us. **[Take a look at it](#)** and schedule a demo with Jack

Cambridge Webinar on DC Plans

Top performers in any business are creative about how they pursue



success. They continually seek out new ways to open doors and deepen relationships while working to help clients achieve their goals. Top-performing DC plan advisors are no different. What are you doing to set yourself apart from your competition? On February 7th at 3pm CST, join Cambridge and NFS for the Best Practice of Defined Contribution Plan Advisors. [Click the link to register today.](#)

StoneCastle High Yield Deposit Account

As rates have risen dramatically, so have requests from clients to have yields better than their bank or sweep accounts. Cambridge has a direct agreement with StoneCastle for their Advisor Cash program. The current (as of 1/2/23) APY is 4% and FDIC coverage up to \$25Million.

To learn more:

<https://www.advisor.cash/>

The dedicated landing page

<https://cambridge.advisor.cash/>

For a contact, reach out to [Morgan Ludovico](#)

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, 2023, 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



First Trust Portfolios/CBOE Vest

Jacob DelMauro

Internal Wholesaler, Structured Products

Email JDelMauro@ftportfolios.com

Christopher Mortimer

SVP of Business Development

CBOE Vest



Intro to Target Outcome Strategies

First Trust Target Outcome ETFs® were introduced in 2019 to target specific investment goals and provide the potential for a level of buffer protection, growth, and income.

Tune in to hear how they work, ways to discuss with your clients, and how other advisors have been strategically placing them in their allocations.

These buffered ETF's do fall under the concentration guidelines for Non-Conventional

funds. You can see the [grid here](#).

Speaker Attachments

[Intro to Buffer ETFs](#)

[Christopher Bio](#)

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