# Weekly Rep Call

2/1/2023

## 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

**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 8th - Jackson National**

**February 22nd - Horizon**

**March 1st - United Life**

**March 8th - Voya**

**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:

### Annual CE

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

NEW: Cambridge is now asking financial professionals to complete their CE by the end of the first quarter if possible. After Q1, they will be running a report of financial professionals with an incomplete CE status, and will be providing it to our OSJ so we can follow up with those on that list.

### Reminders:

### Books & Records

Retention requirements are met when entering documents into CLIC, but Cambridge recommends that you also keep a copy in your own files as a best practice (and we agree!)

## Business Opportunity

### The Pacific Financial Group

**Nathan Rachels**
**VP - Southeast Region**
**Email** nathanr@tpfg.com

**Manage your Client's Workplace Assets**
How would you like to manage your clients 401(K)/403(b)/457 and not have to be the advisor of record?

Tune in to hear how TPFG has solutions through their Self-Directed program so you can have a greater wallet share of your clients assets

**Speaker Attachments**
**Presentation**


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