

Weekly Rep Call

2/1/2023



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 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](#)

Larry L. Qvistgaard, II

President, COO

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