

# Weekly Rep Call

2/22/2023



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.

**March 1st - United Life**

**March 8th - Voya**

**March 15th - No Call**

**March 22nd - Apollo**

**2023 DAR Annual Branch Meeting**

# LAST CALL

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: Advisory Paperwork Requirements

Effective July 1, all new account paperwork must be completed in good order to receive fees. Existing accounts will need to get all outstanding paperwork into the home office prior to July 1 to continue receiving fees. Links to paperwork requirements can be found in the compliance alert. For a refresher course on how to pull qualified compensation reports to see which accounts are missing paperwork, watch the [recording](#) from 2020, or see below steps:

### Qualified Compensation Statements

- Want to make sure you are not leaving money on the table? Run Qualified Compensation Statements in CLIC! These reports are available to identify compensation that Cambridge has received, but payment is on hold due to missing licenses or paperwork
  - Pull the Qualified Compensation statements: log in to CLIC and navigate the Control Panel to Reports. Report type – Compensation. Report – Qualified Compensation Statement
  - Check the report to see the accounts that are pending payout, as well as the reason for being held. The most common reasons are:
    - Deceased client
    - License missing for state
    - No paperwork on file
  - Take the steps to correct the items. Once items have been addressed, contact [payouts@cir2.com](mailto:payouts@cir2.com) for compensation adjustments

As you are reviewing these reports, if you have any questions please contact the following areas:

- For questions regarding compensation on hold due to missing paperwork, contact Operations Account Supervision at 800-777-6080 ext. 3339

- To obtain a state license, please contact Greg Hicks 800-517-9901 ext. 2231 (Greg.hicks@cambridgesecure.com) or Cambridge Licensing (licensing@cir2.com). Once the appropriate license is acquired, the financial professional becomes eligible to receive future compensation. Any commission earned while a financial professional is not properly state licensed will not be payable
- For general questions, contact payouts@cir2.com. You may also open a Service Request through CLIC using Commission or Fee Billing as the topic

## Reminders: Hard copy correspondence

Please continue to hold your hard copy correspondence until the new system in RegEd is live. To get a sneak peek at how to submit in the new system, register for the new Cambridge webinar:

### Communications Review: Submitting Hardcopy Correspondence and Advertising February 23, 2023 1:00 p.m. – 2:00 p.m. CT

## Arund the Product Block



### Updates to Equitable Annuities

Enhancements to their Structure Capital Strategies Plus and Income went live effective February 21st. New 1year Dual Directions, Dual "Step-up" Segments, a standard segment with a 40% buffer, and a Loss Limiter. Details are in the attachments. Feel free to reach out to me if you need to discuss or get a wholesaler contact.

Dual Step Up Segment

Loss Limiter 95

Dual Direction Segment

Cap Rate Flyer

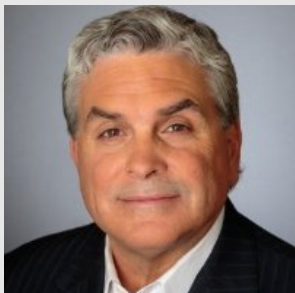
### Upcoming Roth Strategies Webinar

Since their introduction by Congress more than 20 years ago, Roth IRAs have grown at a faster pace than their traditional counterparts. However, Roth IRAs comprise only around 10% of total IRA assets currently. This may be problematic for retirement savers concerned about the threat of higher taxes in the future due to federal government budget pressures and uncertain tax policy. During this session we will explore a range of actionable strategies for clients looking to hedge the risk of potential higher taxes on retirement savings, including:

- Year-end tactical planning strategies to maximize use of income tax brackets
- Considerations for small business owners who may have experienced operating losses due to a challenging business environment
- Using after-tax retirement plan contributions to create substantial Roth saving.

To register for this March 8th 3pm CST webinar, please [click this link.](#)

## Business Opportunity



### Horizon

**Eddie Rollins**

**Senior Managing Director – Head of National Accounts**

Email [er@horizoninvestments.com](mailto:er@horizoninvestments.com)

#### Take Your Advisory Practice to the Next Level!

For over two decades, Horizon's mission has been to empower advisors to help their clients reach their financial goals. They combine rigorous investment research with innovations in portfolio construction to offer practical strategies for all stages of a client's investment journey.

Horizon believes there are three stages to a client's investment journey: [Gain](#), [Protect](#) and [Spend](#). Their strategies are designed to match those common financial goals.

#### Speaker Attachments

[All about Horizon](#)

[Protect Hybrid Quarterly Results CAAP](#)

[Gain Quarterly Results CAAP](#)

[Spend Quarterly Results CAAP](#)

[Horizon Quarterly Report](#)

[White Paper using an Annuity](#)

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