

# Weekly Rep Call

3/8/2023

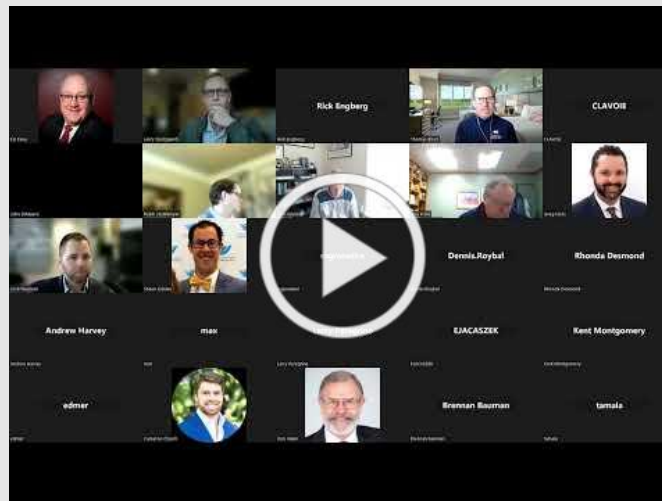


Making It All Work Together

## 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 15th - No Call**

**March 22nd - Apollo**

**March 29th - Equitable**

**April 5th - Inland**

## CJ's Compliance Corner

**Updates:**  
**Pershing: Abandoned Property Management and Quarterly Transfer**



To monitor for Returned Mail and Abandoned Property across all of your clients' Pershing accounts, it is recommended that you use the Returned Mail – Lost Security Holder IFA. Step-by-step instructions for this process and how to update accounts can be accessed by clicking this [link](#).

## RegEd Release Dates

Cambridge has re-released the anticipated launch dates for new RegEd modules. Check the [bulletin](#) for the full calendar, and tune in on March 22nd for a demonstration on the new system.

## Around the Product Block



### Pershing/NFS ACH Updates

Cambridge announced the release of real time bank account status verification at Pershing and NFS with EWS. EWS is a third-party service provider that conducts real-time bank account status and account ownership verification services using a proprietary matching logic that compares the names and SSN/TIN on the brokerage and bank account. This service provides straight through validation of bank links with participating banks, for which ~70% of U.S. Banks participate.

To avoid Cambridge reaching out for supporting documentation, we encourage you to establish the ACH link in NetX360 or Wealthscape, which will provide you with the results of the EWS verification immediately. If the link comes back with a status of invalid, error, or unknown, you will be required to submit supporting documentation to Cambridge for review. Cambridge will also follow up with you after initiation to outline the additional requirements.

The ACH form signed by the client detailing the bank account information is still required to be sent to Cambridge for books and records purposes, regardless of bank validation.

For more information on each Clearing firm, click the links below:

[Pershing](#)

[NFS](#)

### Upcoming CLIC Advisor Webinar

Leveraging CLIC Advisor to Create Efficiency

Please join Cambridge for a webinar to help launch you into the next phase of CLIC Advisor. For the hour we will discuss what has worked with our own super user Shanna Tingom. With this call you will learn key takeaways to help include CLIC Advisor in your daily processes and create consistent procedures to help excel your office and client's goals.

[Click here to register for the webinar on March 22nd 3pm CST](#)

### 4% Referral Bonus Reminder

The Cambridge Financial Professional Referral is still active. As a reminder, if you know a financial professional that is looking to make a move, please contact me directly. I will link him/her to

you with Cambridge. If they accept the offer to come on board you will get:

- **2% of their verified production on their first FINRA day with Cambridge**
- **2% on their actual first 12 months Cambridge production paid to you in month 13**
- **Maximum \$50,000 per referral**

## Cambridge Research and Analysis Page

Launching on March 9th, 2023 will be a brand new Research and Analysis page that will include on day 1 the Cambridge Mutual Fund recommended list by asset class for active mutual funds. Coming soon, will be Market Commentary. Official notification will come through on the Weekly Announcement email.

## Business Opportunity



### Voya

**Josh Nauman**

**Sales Manager - West**

Email [Josh.Nauman@voya.com](mailto:Josh.Nauman@voya.com)

### A Shares, C Shares - Nope No Worries

In the commission brokerage world, there's a fine balance between choosing A shares or C Shares in retirement accounts, but what if you had a solution where that doesn't come into play?

Voya Select Advantage is a cost effective way to give your clients broad asset class diversification across top tier money managers and you don't have to worry about selecting A or C shares.

#### Speaker Attachments

[Voya Select Advantage](#)

[Consultants Map](#)

[State Mandatory Retirement Plans](#)

### Larry L. Qvistgaard, II

President, COO

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