

Weekly Rep Call

3/22/2023



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 29th - Equitable

April 5th - Inland

April 12th - Orion

April 19th - Lord Abbett (Caitlin Schaefer)

April 26th - CION Investments

CJ's Compliance Corner



Reminders: New Vendor Review Guidelines

With changes to the advertising procedures at Cambridge, some material is now approved at the firm level, which means it does not need to be submitted for marketing approval. View the [full list](#) of approved vendors, and start saving advertising submission time!

Compliant Texting

Cambridge reiterated the importance of compliant texting at our branch meeting. Be sure to sign up - at no additional cost - on CIR2.com for the texting solution of your choice.

Hard Copy Correspondence

The RegEd module is now live, and ready for your January - March submissions. Under the new system, no action is required if no hard copy correspondence has been sent/received.

Around the Product Block



Branch Meeting Recap

We really appreciate everyone who joined us down at ChampionsGate last week. For those that did, please make sure you complete the survey emailed out to you. If you don't have it, [please click this link](#).

If you were unable to attend, we had most of it recorded. Be on the lookout, at some point next month, communication that it is on Duncanar.com

Plan Now - Ignite 2023

Plan now for Cambridge Ignite 2023 September 20-22 2023. The event will be held at the [Gaylord Palms Resort in Kissimmee, FL](#)

New Greenback Capital Offering

Greenbacker Renewable Energy Company II ("GREC II") maintains the same core strategy as our previous vehicle, investing in and professionally managing renewable energy power generation facilities. These sustainable infrastructure assets, typically solar and wind facilities, are under long-term contracts with an investment grade counterparty (most frequently a utility) to buy 100% of the electricity each site produces. The fund generates a 100% tax deferred distribution and provides access to stable returns that are uncorrelated to public market volatility.

For more information, review the links below.

[Tax Considerations](#)

[GREC II Offering Sheet](#)

[GREC II Investor Presentation](#)

Business Opportunity



Jason Singer

Partner, Client & Product Solutions Team

Email jsinger@apollo.com

Finding opportunity in the market chaos

Will the Fed continue with rate increases? Has the credit market stabilized. Will markets begin to soften?

Tune into Jason Singer from Apollo to hear about his thoughts on the market and how the Diversified Credit Fund can be a stabilizing option in your clients portfolios.

Speaker Attachments

[**Apollo Diversified Credit Fund**](#)

[**Apollo Diversified Credit Fund Fact Card**](#)

[**Apollo Territory Map**](#)

<https://apolloacademy.com/>

<https://apollodiversifiedcreditfund.apollo.com/>

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