Weekly Rep Call

4/26/2023

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.

May 3rd - Prudential

May 10th - DWA

May 17th - MassMutual

May 24th - Bluerock

May 31st - Nationwide

June 7th - Pacer Financial

June 14th - Lincoln Life

June 21st - City National Rochdale

CJ's Compliance Corner

Updates:
RightBridge

RightBRIDGE has recently updated their user interface. There is no change in submission requirements or the required information to complete the submission. However, some of the major changes can be found on the Cambridge official announcement.

Annuity Disclosure

Cambridge has released a combined Annuity Disclosure Form. This new form will take the place of the Variable Annuity, Fixed Indexed Annuity, and Fixed Annuity Disclosure Forms. For full details of this change, check out the bulletin on CIR2.com

eSignature

Starting today Cambridge is making an enhancement to eSignature. Users will now have the ability to resend an eSignature envelope at any time. Historically, it was only possible to resend an envelope once if your client has failed their authentication. This button will be available in your associated paperwork section on the Actions tab for the account you are working with as well as in the All Envelopes tab in the Work in Progress

Social Media

The Advertising Review team is introducing a new process for social media posts that will allow financial professionals to post most content without obtaining pre-approval. All licensed individuals – both administrative and active financial professionals – will be required to complete a pre-recorded training through Knowledge Center University (KCU) within 30 days of the date the course is assigned. New financial professionals will need to complete the training within 30 days of their onboarding date. Additionally, ongoing training will be required on an annual basis. For more information, see the Cambridge Special Report

Reminders:
Tax Documents

Pershing does not send 1099s to clients who requested no paper via NetX Investor online portal (they said it's an IRS issue). To receive it via NetX Investor, each client must go into their online account and set the tax document option. See the attached instructions for how to opt-in to electronic tax document access

Correspondence

Correspondence now DUE if you have anything to submit

- **New RegEd module demo**

Around the Product Block

Branch Meeting Videos

If you were unable to make it to our Branch Meeting OR you

want to revisit something you heard, please visit our internal site to see it all ->**https://duncanar.com/branch-meeting-2023/**

Secure Act 2.0 Webinar by MassMutual

Join Jenny Kiffmeyer, JD, Chief Operating Officer of, of Retirement Learning Center as she provides an overview of the many aspects of the new retirement-related legislation know as SECURE 2.0. This bill makes significant changes to most aspects of the retirement environment including expanded contribution limits and credits, enhancements of SIMPLE IRA arrangements, emergency saving account options in 401(k), and matching of certain student loan payments. In addition, we'll cover changes to excesses, corrections, RMD and rollover rules. Lastly, the timing, amendment and effective dates of key provisions will be discussed.

Join us on Wednesday, May 3, 2023 at 2:00 p.m. ET.
Register Today

Creating a Social Media Strategy Webinar by FMGSuite

Stacy Havener, Founder & CEO of Havener Capital Partners, and Samantha Russell, Chief Evangelist with FMG, will be sharing their top four tips for creating a successful social media strategy.

they'lll also be doing a live assessment of advisors' LinkedIn profile pages and posts, giving you insight into what we would change and how to do it.

In this webinar, you'll learn:
□ How to create a personal brand that stands out

□ The difference between gated content and zero-click content

□ How to integrate storytelling into your marketing

… and much more!

□ **Save your seat to supercharge your marketing!**

Peakstone Realty Trust

There has been a lot of Cambridge related buzz about the NYSE listing of Peakstone Realty Trust.
Peakstone will be holding a webinar on the recent developments concerning their listing Thursday April 20th at 4:30pm EST

Information can be **found here**

The buzz was generated from financial professionals like you on Cambridge Nation. If you have never registered or it's been a long time, **click here**

The Value of Independence and Referral Bonus

If you come across a financial professional that could use the Independence, internal control, and support of Cambridge and Duncan Advisor Resources, please let me know. Until the end of this year, Cambridge is giving you a chance at a 4% bonus for every referral you make and joins Cambridge within 12 month. Listen to my thoughts on this in the rep call and the details.

Pillars of True Independence
Getting to know Cambridge

Business Opportunity

CION Investments

Derek Schwartz
Managing Director, National Sales
Email dschwartz@cioninvestments.com

CION has many tools for your practice
You can never have enough tools to help your practice grow and thrive. Tune in to hear Derek discuss Advisor I/O. It is their practice management / value add platform, which provides advisors with customizable articles, email campaigns, and lead-gen assets, and on-demand coaching to help scale digital marketing.

He will follow that overview with their podcast, Advisor Lab By CION, which was ranked top 10 Best Podcast for Financial Advisors by U.S. News last November. The podcast focuses on guests and topics that provide financial advisors with tactics and advice to help them build the practice they want. They dive into new tech products and services and ask the hard questions, bring on thought leaders around markets and economics, and get deep on the trends they see in the space, from advisors who are out in front of them.

Finally, he will provide a brief overview of our currently approved credit interval fund, the CION Ares Diversified Credit Fund.

Advisor I/O | Financial Advisor Marketing Platform (advisorio.co)

Podcast - Advisor I/O (advisorio.co)

Updated Territory Map
CION Ares Diversified Credit Fund - Investing in your Daily Life
Diversified Credit Fund in a Nutshell
DCF Fact Sheet

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