Weekly Rep Call

5/03/2023

Duncan ADVISOR RESOURCES

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.

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

June 28th- Advisors Capital Management

CJ's Compliance Corner

Updates:
Pershing Standing Payment Instructions

To help financial professioanls manage standing instructions and view banks associated with instructions, new reports are available and can be accessed in Report Center in NetX360. See the announcement for the types of reports available

Reminders:
Mandatory Social Media Training

The Advertising Review team is implementing a new process to streamline the social media posting process for financial professionals. All licensed individuals – both administrative and active financial professionals, regardless of whether they have a disclosed social media account – will be required to complete a pre-recorded training called “Social Media Use in Marketing” through Knowledge Center University (KCU), and should have received an email from noreply.pc2@cir2.com with the assignment and instructions last week. Licensed individuals will have 30 days to complete the training, and additional training will be required annually. For more detail, see the compliance alert

RightBridge

Now with a new look and feel! Check the recording to confirm that you are seeing the latest and greatest version of the system!

Around the Product Block

Branch Meeting Videos Level Up Your Marketing Game

Take your marketing game to the next level with an assortment of branded golf items available on Cambridge’s marketing portal, MarketCentral®.

Stock up for client giveaways or for your own use:

- Callaway Warbird golf balls
- Men’s and women’s Vansport Planet Polos
- Lightweight Front Runner cap

MarketCentral is accessible from the Tool Grid or ribbon menu on cir2.com. Under the Shop dropdown, click Apparel or Branded Gifts to begin personalizing golf items and more. If new to the portal, you can create your persona by navigating to Account, then Personas. Click the Add New Persona button and complete all required fields.

The Ins and Outs of Valuation

Have you ever wondered how a valuation of your business is completed? Join the Succession and Acquisition Solutions team to learn about the various factors and their importance to determine what the value of your business is worth.

May 9, 2023 04:00 PM EST.
Register Today

Using Digital Strategy to Retain Clients and Convert Leads

Want to learn more about how digital marketing solutions at Cambridge can help educate clients, convert leads, and level up your overall marketing presence? Join us Thursday, May 18, 2023, for this month's Cambridge Source webinar.

Christina Alford, Ian Bee, Teresa Sutton, and Steve Walton will discuss the Cambridge Source Website Design and Development and Customized Marketing offerings. They will also offer insight on how your website, newsletters, and social media content can work together to provide a seamless brand experience for your clients and prospects and share best practices to incorporate in your digital strategy.

May 18, 2023 04:00 PM EST
Register 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

Prudential

Ted Repass
Divisional Vice President
Email ted.repass@prudential.com

Prudential is here to support your personal growth
From Advanced Roth strategies, to charitable giving, or even experiencing identity theft, Prudential has loads of content to help sharpen your skills and educate your clients.
Tune in as Ted runs through the Advanced Planning and Sales Technology content that Prudential has to help support your business, growth, and educations of clients.
He will also review the Prudential Annuity options to help your client's retirement needs.

Technology Content
Advanced Planning
FlexGuard Income Core Rate Sheet
PruSecure Rate Sheet
FlexGuard Income Illustration
Income Deferral Table
Wholesaler Map

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