# Weekly Rep Call

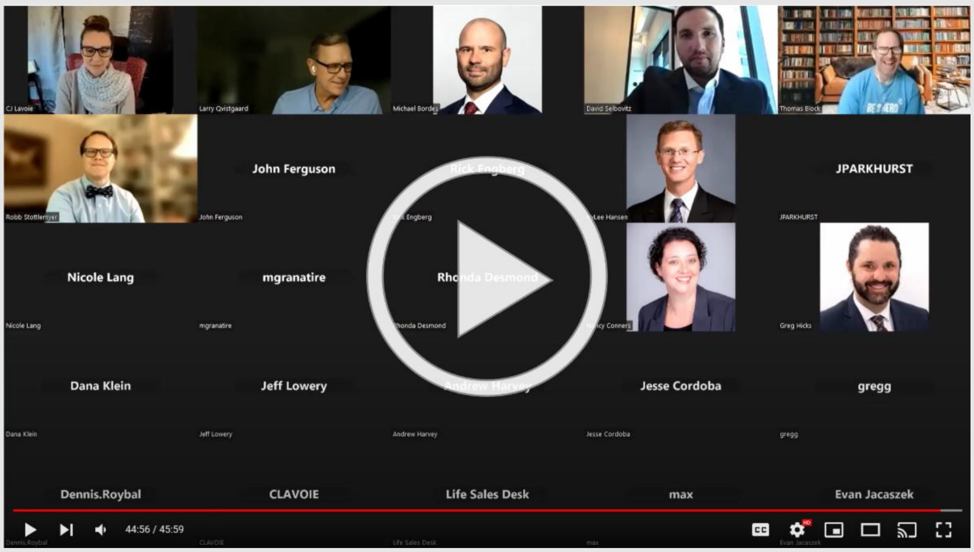
Duncan
ADVISOR RESOURCES
Making It All Work **Together**

5/17/2023

## 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 24th - Bluerock**

**May 31st - Nationwide**

**June 7th - Pacer Financial**

**June 14th - Lincoln Life**

**June 21st - City National Rochdale**

**June 28th- Advisors Capital Management**

**July 12th- Destra**

**July 19th- CIM Group**

**July 26th- Stepstone**

## CJ's Compliance Corner

### Updates:
### Advisory Paperwork Requirements

As announced earlier this year, Cambridge is beginning to reach out to financial professionals to request submission of missing paperwork on advisory accounts. From feedback received from financial professionals in our branch, we have determined that some of these instances of missing paperwork are not correct. If you want to confirm what paperwork is missing, please contact Nicole Lemley at Cambridge to request additional information. New reporting capabilities coming to Cambridge in July should reduce the number of erroneous paperwork requests

### Hearsay

On Monday, the look and feel of Hearsay's navigation experience was updated, with the goal of making navigation more intuitive so users can find what they need faster and can complete tasks more efficiently. For more details, and a demo video, read the full article

Click here for the compliant texting solutions homepage

### 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. Licensed individuals will have 30 days to complete the training, and additional training will be required annually. For more detail, see the deadline bulletin, or check out the original compliance alert

### eSignature

First American Funds is now accepting CLIC® eSignature on paperwork. Remeber that DocuSign is the only approved electronic signature software by Cambridge compliance

## Around the Product Block

### Cambridge Retirement Plan Academy Webcast

This webinar was held May 17th at 4pm EST.

Details on the topic can be found below and you will see the recording appear in two weeks by clicking **this link** and going to

On-Demand Webinars (**Where you can see all the previously discussed Cambridge held webinars**).

Whether you're on the hunt for new retirement plan prospects or want to research a specific opportunity, the Form 5500 provides a fast and efficient way to get the plan details needed to proceed with confidence. More than just a disclosure document, the Form 5500 can be an effective guide to determining whether a retirement plan has room for improvement – such as underperforming investments, gaps in service, poor participant education or unreasonable fees – and how you may be able to add value for that plan sponsor.

Join Nicole Hinman, Senior Director of Retirement Plans at Cambridge and Bob Woods, National Sales Director at Mutual of Omaha, as we explore:

• How to access Form 5500 filings
• Information contained on Form 5500
• Key characteristics codes
• Prospecting techniques to stand out

## New Accumulation Solution from Allianz Life

Discover a new frontier in accumulation at Allianz!

They're blazing a new trail in the accumulation-focused FIA space with the Allianz Accumulation Advantage Annuity. Engineered to provide stronger performance with product innovations along with the service you expect from an industry leader. Join them to learn about the ability to diversify among 18 allocation options from names you know (like S&P®) as well as our Index Lock combined with MY (multi-year) point-to-point crediting - designed to offer longer-term crediting's higher par rates without the long wait.

Registration for the May 18th @ 4pm EST event **can be found here**

## Institutional Opportunities for Today's Clients

Join the CIM group for a deep dive into this opportunity discussion. This time to educate everyone on the two funds CIM Group currently has approved at CIR. That being their Interval Fund (RACR) and Preferred Stock Offering (CMCT)

Registration for the event June 1st @ 4pm EST **can be found 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

### MassMutual Investments

**Michael Bordes**
**Investment Wholesaler - Wealth Management Distribution**
**Email mbordes@massmutual.com**

**David Selbovitz, CFA, CAIA**
**Head of Portfolio Strategy & Analytics**
**Email DSelbovitz59@massmutual.com**

The bond market has been on many roller coasters for the past year plus. There is a tool to build more risk aware portfolios using high yield that is underappreciated.
Tune in to hear the latest on the high yield landscape, spreads, and how to implement this asset class in your portfolios.

**High Yield Deck**
**Wholesaler Map**

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