

Weekly Rep Call

5/24/2023

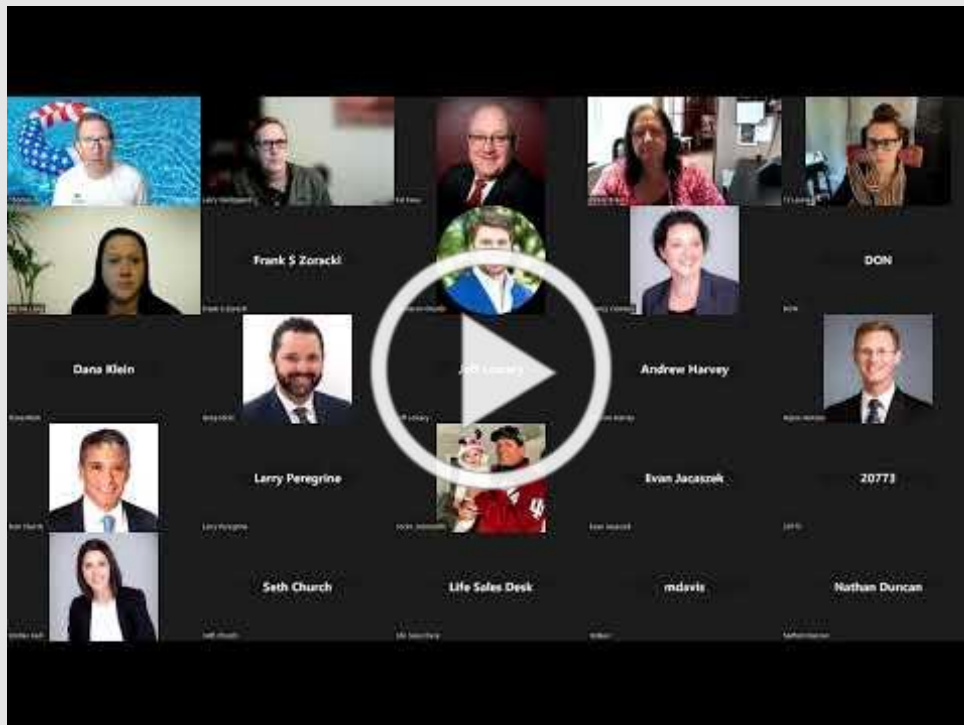


Making It All Work Together

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.

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:

E&O - Pricing Announced

Pricing details are now available on the [Cambridge website](#). The cost remains unchanged from last year. If you are interested in increasing your coverage limits at renewal, the deadline to submit applications to Cambridge is May 12, 2023. The deadline to communicate any other desired changes to your coverage is May 19, 2023. Please note that optional coverage can be added at any time throughout the year, increased limits are only available at renewal. June 1, 2023 – June 15, 2023, financial professionals will receive their updated E&O certificates through E-mail directly from AON. Many financial professionals overlooked this email last year as they believed it to be spam. Please keep an eye out for the email from an [@aonriskservices.com](#) domain address.

Reminders:

BIA form

If selecting "I have made a best effort to obtain the fees and expenses of the current account" on the best interest analysis form section 7a, we will pend the trade key back to ask for confirmation that you cannot obtain a 5500. You can alternatively add a comment in the notes section of the form to confirm that you searched for the 5500 and were unable to obtain it.

Social Media Training

Due by June 5th!

Around the Product Block



Send me great things happening!

If you have major life events, professional accomplishments, new hires, or community events, we want to start promoting that on our [DAR LinkedIn page](#).

Send it to thomas.block@cambridgesecure.com

New Jackson RILA

The new version of Jackson's RILA - Market Link Pro II will be available for sale June 5th. One page financial professional use only details of the contract can be [found here](#)

NEW ENHANCEMENTS

- 3-year Index Account Option term
- Performance Boost* crediting method, which allows for crediting even in down markets

- Intra-term and End-term Performance Locks, allowing flexibility to lock in gains

Please reach out to your Jackson wholesaler for more information, or email me if you need a contact.

New Inland Multifamily product approved

IVP Milwaukee Multifamily, LLC has been approved, offering the opportunity to invest in a ground-up multifamily development in the historic Third Ward district of Milwaukee, Wisconsin, one of the most competitive rental markets in the country.

Upon completion, the highly-amenitized Class A apartment community will include 261 apartment homes and wrapped parking. The Third Ward is one of Milwaukee's most vibrant and sought-after neighborhoods, with an abundance of art galleries, restaurants and shops.

Links to important offering materials: <https://inland-investments.com/ivp-milwaukee-multifamily-llc> (Passcode: MTW223).

U.S. Energy 2023 Drilling Fund

The USEDC 2023 Drilling Fund LP will participate in the drilling of new wells which are intended to provide significant upfront or long-term tax benefits, depending on the investment unit you choose. The fund intends to generate cash flow from operations, a portion of which will be tax advantaged as the result of Depletion, Depreciation and/or Qualified Business Income Deductions.

[2023 Drilling Fund Investment Highlights](#)
[Early Investor Incentives](#)
[2022 Tax Handbook](#)

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

Bluerock Capital Management

Dan Church, CFP
Senior VP, Wholesaler Institutional Real Estate Investments



Email dchurch@bluerockcm.com

Dan will review how the Institutional Real Estate market is going so far this year and how Bluerock's investment options are performing and why.

Private Equity Real Estate & What To Watch.

2 Problems

3 Historical Markers

2 Positive Metrics

[Total Income Fact Sheet Q123](#)

[NPI Property Index historical performance](#)

[Commercial RE Perspectives](#)

[Total Income Q1 23 Talking Points](#)

[IPERE Bar Chart](#)

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