

Weekly Rep Call

6/7/2023



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.

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



Social Media Policies

Effective as of June 5th! Refer to the Cambridge [special report](#) for more details about how procedures have changed

Account Periodic Announcement

Coming in Q3! This addition to trade review will monitor accounts based on account activity and allocation over a specific time period, as opposed to the current system only based on individual trades.

These flags will target three areas:

Turnover: Identifies accounts that have a higher than expected amount of turnover based on the account investment objective

Concentration Single Security: Identifies accounts with an excessive concentration level in a single security based on risk tolerance

Commission Velocity: Identifies accounts with higher than expected commissions and/or concessions relative to assets based on the investment objective

Around the Product Block



New Bluerock Common & Preferred Stock

Bluerock Industrial Growth Common & Preferred Stock offerings are now available at Cambirdge.

Preferred Stock highlights:

- 6% annual dividends, paid monthly
- Senior position to the Company's common stock

Common Stock highlights:

- Planned monthly distributions with annual increases
- Principal growth with contractual stock dividend
- Unlimited upside potential

[BIG Pitchbook](#)

[BGR Common Stock Sheet](#)

[BGR Preferred Stock Term Sheet](#)

[BGR Brochure](#)

<https://bluerock.com/the-industrial-re-revolution/>

New Apollo Aligned Alternatives

AAA is a perpetual, semi-liquid fund which offers investors access to Apollo's comprehensive alternatives platform, including new and existing strategic private direct investments, existing and new Apollo funds.

AAA offers investors the opportunity to invest side-by-side with Apollo in a fully scaled, existing portfolio of funds

across yield, hybrid and equity. We believe it offers alignment for investors and access to deep general partner relationships. Apollo Aligned Alternatives also seeks to directly invest in leading businesses in focus markets such as aviation, healthcare and mortgage. Please reach out to your Apollo wholesaler to learn more.

[AAA Fact Card](#)

[AAA Performance Summary](#)

[AAA Holdings Report](#)

[Apollo Territory Map](#)

Changes to Pershing fractional shares trades

Pershing will be retiring the fractional share liquidation process for Equities and ETFs. Beginning June 29, 2023 users will be responsible for liquidating any fractional positions.

Once available users will be responsible for liquidating fractional positions as Pershing will no longer automatically liquidate fractional shares that remain from an executed sell order. Please note that you must use the “New Experience” screen in order to liquidate fractional positions. Failure to do so will result in fractional shares not liquidated and will require a new order to sell those shares left in the account.

To learn more and see a screen shot of the new process, [click this link.](#)

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



Pacer Financial

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Wouldn't you like to save time evaluating ETFs and/or Mutual Funds? CJ will review 3 online tools that he uses in 90% of his meetings that really help financial professionals find recommendations that fit their clients needs AND they are free to use.

When it comes to acquiring additional assets and finding net new households, Pacer Financial has some great tools to help you. Tune in to hear about these practice management modules.

Websites from today:

Koyfin: <https://app.koyfin.com/>

ETFRC: <https://www.etfrc.com/funds/overlap.php>

Fidelity tax drag tool: <https://www.fidelity.com/>

Portfolio Visualizer: <https://www.portfoliovisualizer.com/>

[Perfecting Partnerships](#)

[Pacer Wholesaler Map](#)

[Value Add Summary](#)

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