Weekly Rep Call

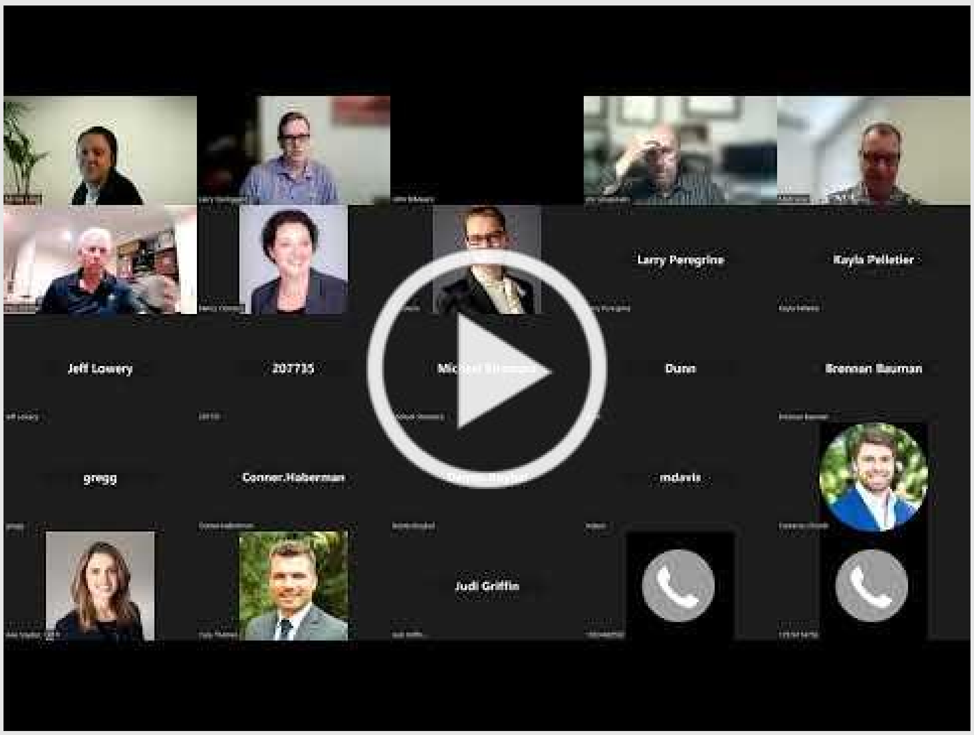
6/14/2023

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.

June 21st - City National Rochdale

June 28th- Advisors Capital Management

July 5th- No Rep Call

July 12th- Destra

July 18th- Solo Practitioner/Admin call 1pmCST/4pmEST

July 19th- CIM Group

July 26th- Stepstone

CJ's Compliance Corner

OSJ Trade Review Procedures

Curious about when and why reminder E-mails are sent about trade keys? Watch to see exactly how we process new keys that come into the system, and how you can avoid notifications

Discontinued Forms

The IRA Rollover Disclosure Form and Recommended Strategies Form have both been discontinued. They will no longer be available from Cambridge, and are not required for account submissions

Around the Product Block

Determine the Value of Your Business

Have you ever wondered how a valuation of your business is completed?

Financial professionals at Cambridge have access to the Succession and Acquisition Solutions Team, a dedicated team that specializes in valuations.

Whether you want to sell your business, acquire a business, or more fully understand your business's growth, their knowledgeable consultants are equipped to help guide you through the entire process.

You can learn more about the factors and methodology considered when completing a valuation by accessing their recent webinar, **The Ins and Outs of Valuation,** hosted by Cambridge First Vice President Kris Emick.

Upcoming Texting Webinars

We have talked at great length over the past month about texting solutions and making sure you are compliant with that.
Coming up on June 28th, Cambridge will be hosting webinars involving both of the approved tools: My Rep Chat and Hearsay.
Texting Solution: MyRepChat
June 28, 2023 | 1:00 p.m. - 2:00 p.m. CT | Register here

Hearsay Texting: Leveraging Delegates
June 28, 2023 | 3:00 p.m. - 4:00 p.m. CT | Register here

Ignite

It is that time again for Cambridge's Annual Ignite conference in Orlando Florida.
The event will be held September 20-22 at the Gaylord Palms Resort.

We would love to see a massive showing so please **register** for the event. We will be doing our enterprise dinner on Thursday night.

Agenda

Highlights for the closing reception at Universal Studios include:

Exclusive CityWalk Block Party that includes:

· Interactive DJ
· Live Reggae Band
· Dueling Pianos
· Live Band Karaoke

Private dessert reception at Marvel Super Hero Island, attractions include:

· The Amazing Adventures of Spider-Man®
· Skull Island: Reign of Kong
· Jurassic Park™ Velocicoaster
· The Incredible Hulk Coaster®
· Doctor Doom's Fearfall®

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

Lincoln Financial Life

Tim Lockwood
Sales Vice President
Email Timothy.Lockwood@lfd.com

As financial professionals, you work with clients for years sometimes decades to save money for a healthy retirement. What happens if a major medical expense like Long Term Care happens? How do you as the financial professional position the discussion?
Lincoln Financial Life has an entire library of tools at your fingertips to education your clients as well as yourself on the topic.
Tune in as Tim runs through the library as well as how Lincoln is positioning their product suite to help you.

Marketing Library
Asset Identifier
The Money Guard Suite
MoneyGuard Market Advantage
Weighing Your LTC Planning Goals

Know the cost of LTC in your state:
www.whatcarecosts.com/Lincoln
· **Sponsor Code: LTC**

Larry L. Qvistgaard, II
President, COO
Duncan Advisor Resources
215 Avenida Del Mar, Ste. B, San Clemente, CA 92672
T 800.517.9901 x2230 **C** 949.306.0060 **F** 707.676.8633
www.duncanar.com

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