

Weekly Rep Call

6/21/2023



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 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

August 9th- Allianz

CJ's Compliance Corner



AdView Deadline

As [previously discussed](#), financial professionals have until March of 2024 to pull marketing materials from AdView. To submit for review in the new system, access Communications Review from within RegEd. For more details on the deadline, see the initial bulletin posted by Cambridge [here](#).

[CLIC AdView User Guide](#)

[Advertising FAQs](#)

[Communications Review User Guide](#)

[Submitting Hard Copy Correspondence](#)

Structured Products

Cambridge is putting additional consideration into whether to proceed with the announcement from the [May 5th rep call](#) regarding structured products. For more information, check out their [original bulletin](#) along with their [most recent post](#).

Undeliverable E-Mail

Clients with an E-mail address hosted on Gmail may not be receiving your messages. Cambridge has released [instructions](#) to update your domain to be compatible with Gmail authentication

Around the Product Block



Business Building Resources

Are you considering a full coaching engagement or consultation with our Practice Management Team to grow or streamline your practice? We now have templates, worksheets, and samples to help you take your business to the next level available on the Cambridge website.

Take a look at all the great content by [clicking the link](#)

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[®]

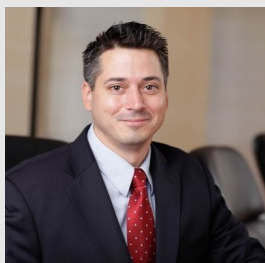
The Value of Independence and Referral Bonus

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



City National Rochdale

Jared McDaniel, CFA, CPA, CFP, CMT, APWA, AIR
Senior Investment Consultant

Email **Jared.Mcdaniel@cnr.com**

CNR has helped independent advisors win new high-net-worth clients.

Tune in to hear Jared cover several areas of strength that the partnership with CNR will help Duncan advisors earn the “Right to Win” new clients. Specifically CNR does a great job at creating “intelligently personalized” portfolios to specifically address the client’s specific growth, income, risk, tax, estate planning goals and objectives as well as any other unique preferences or concerns.

[Duncan Presentation](#)

[CNR Partnering Guide](#)

[CNR Speedometers June](#)

[Territory Map](#)

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