Weekly Rep Call

5/31/2023

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.

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

The Roybal Rumble

Preparing for the upcoming branch visits

Dennis joined the squared Zoom circle to provide multiple suplex's of knowledge on the upcoming branch visits currently being scheduled. Here are a few best practices so you don't get hit with a super kick of deficiencies:

- Know your business mix and how you get clients
- Understand the importance of cybersecurity
- The latest required regulatory deliveries to clients
- Your OBA's

Plus a lot more.

Feedback is very critical during these visits:

- What's going well/wrong with Cambridge
- What's going well/wrong with your supervision team at Duncan

Please review your email for requests to schedule a visit and respond in a timely manner.

Around the Product Block

Changes to DWA Portfolios

Tom Walsh took a few moments to review the changes in our Small Cap holdings within the Active portfolio's and an ETF replacement within the Income options.
Fact sheets are currently being reviewed and should be on duncanar.com by next week.

Upcoming 1031 Webinar

Section 1031 of the Internal Revenue Code provides an effective strategy to defer capital gains tax. However, to successfully execute a 1031 exchange transaction, there are guidelines that need to be followed. During this session, we will explore:

• The Delaware Statutory Trust (DST) and benefits of this structure for both the exchanger and lender
• How leveraging the 1031 exchange could lead to more dollars for reinvestment
• Different strategies that can be used to generate passive income (PIGs) and passive activity losses (PALs)

This webinar will be Jun 14, 2023 04:00 PM and you can **register here**

CIRStatements Mobile App

Larry is currently testing out the new client version of CIRStatements as a mobile app. Cambridge is currently approving Financial Professionals on a "as requested" basis. Once we get Larry's feedback and this seems like a tool clients will enjoy, I will intake your names to have it turned on.

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

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The Nationwide Retirement Institute® offers insights and actionable solutions to help consumers in their critical moments. We tackle major retirement topics such as Social Security, taxes, health care and long-term care costs, breaking down these complex topics with insightful research and materials.
Tune in to hear all the details about NRI as well as how Nationwide's approved annuities portfolio can support your business no matter how you choose to work with clients.

DPA Rate sheet
Income Enhancement
New Heights Select Core
Advisory Annuities
DPA Solution
Zebra Index Strategy
NRI Topics
All about NRI

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Making It All Work Together