

Weekly Rep Call

7/12/2023



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.

July 13th- CLIC New Account Opening Featuring Thomas Block
4pm EST [Register Here](#)

July 18th- Solo Practitioner/Admin call 1pmCST/4pmEST
[Zoom Link](#)

July 19th- CIM Group

July 26th- Stepstone

August 2nd- DWA 2nd Quarter Review

August 9th- Allianz Life

August 30th- Duncan Financial Planning

Ignite 2023

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[®]

CJ's Compliance Corner



Account Periodic - Trade Review

Cambridge has launched an new supervision piece this week called Account Periodics. These flags are behind the scene review based on heavy concentration in a single concentration, commission velocity, and turnover.

As we get these flags, we will first try to clear them out on our own if we can easily see the answer, otherwise please peek into trade review a couple times a week to see if there is something to be addressed.

To see how we as supervisors are looking at these flags, please take a [look at this guide](#).

Threads

Meta launched the newest social media platform last week. It has

similarities to twitter. Currently, Threads is not an approved platform for business purposes. You can open up a personal account without issue.

Around the Product Block



StepStone Conversion to Mutual Fund Ticker

StepStone Private Markets (SPRIM™) on July 17, 2023 will be valuing and publishing a daily net asset value (NAV), allowing investors daily admittance into SPRIM.

SPRIM will offer the opportunity to buy shares through select mutual fund platforms via a ticker which will avoid the need to complete paper subscription documents. For platforms that prefer subscription agreements we will continue to accept them.

SPRIM Ticker Symbols
Share Class I: XPMIX
Share Class D: XPMDX
Share Class S: XPMSX
Share Class T: XPMTX

They will be hosting a webinar on July 13, 2023 at 1:00 p.m. ET, to provide further information about these changes. If you wish to attend, please register [here](#).

Jackson National Data Breach

On June 26, 2023, Jackson National Life Insurance Company filed official documents with the Securities and Exchange Commission outlining a third-party data breach affecting consumers nationwide.

The sensitive personal data of as many as 800,000 Jackson National customers was compromised when hackers were able to access their data through a vulnerability in software used by PBI Research Services.

Clients were sent a letter by mail. If you have not proactively taken the steps to discuss this with your clients, please do so.

Upcoming Cambridge Webinars

What options exist to complete a sale or acquisition of a financial services business so both the Buyer and Seller achieve their goals? Join the Succession and Acquisition Solutions team to review goes into a deal and walk through a summary of unique real life examples to help guide you toward the best structure.

July 25th 4pm EST. [Registration is here!](#)

Please join Cambridge as they host Renaissance Charitable Foundation for an overview on how donor-advised funds (DAFs) work, learn which clients may benefit the most from a DAF, and how to get started with the Cambridge Charitable Gift Fund.

Jul 26, 2023 04:00 PM EST. [Registration is here](#)

Upcoming July 13th Webinar

We invite you to join our upcoming webinar to learn more and further explore the system and functionality. Special guest Thomas Block, AAMS[®], AWMA[®], CRPC[®], Branch Manager/Recruiter with Duncan Advisor Resources will be on the call. We will discuss how the Duncan team has adopted and incorporated CLIC^{New!} Account Open into their day-to-day processes, change management, and user experience. A demonstration of the system and the latest enhancements, including a recent release that simplifies setting up new accounts for existing clients, will be provided.

CLIC^{New!} Account Open: Learn With Your Peers Webinar
Thursday, July 13
3:00 p.m. – 4:00 p.m. CT

[Click here to register](#)

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



Destra

Duncan Farley
Portfolio Manager
Event Driven Credit Fund



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Navigating the perfect storm in the European midmarket

The past few quarters have amounted to a perfect storm for European corporates. Years of ultra-accommodative monetary policy and excess liquidity were followed by higher inflation and a hawkish response from Central Banks.

Inflation turned out to be higher and longer-lasting than anticipated. Central Bankers globally raised rates, translating to a breakout from a thirty-year downward trend channel. The tone of debate remained hawkish at the end of 2022 in the US, the UK and Europe and even in Japan.

Tune in to hear from our partners at Destra talk about what's going on in Europe and how they are taking advantage of it within their International Event Driven Credit Fund

[Presentation Slides](#)

[Whitepaper](#)

[Intl Event Driven CF](#)

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