

# Weekly Rep Call

7/19/2023



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 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<sup>®</sup>
  - Skull Island: Reign of Kong
- Jurassic Park™ Velocicoaster
- The Incredible Hulk Coaster<sup>®</sup>
  - Doctor Doom's Fearfall<sup>®</sup>

## **CJ's Compliance Corner**



### **Structured Products**

Cambridge is still 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](#).

### **Changes to Forms**

- [IRA/ESA Distribution Request Form](#)
- [Beneficiary Distribution Request Form](#)
- [Roth Conversion/Recharacterization Request Form](#)
- [QRP Distribution Request Form](#)
- [WealthPort Wrap Client Agreement and Application](#)

Both Pershing and FCCS/NFS have updated several forms over the past few months. When this occurs, both clearing firms accept both the expiring form and the new form for a short period of time. These fluctuate depending on the reason or regulation for the update. Once that grace period expires, only new forms are accepted by both clearing firms and by Cambridge.

### **Admin & Solo Practitioner call**

**In case you missed it, here's a link to Tuesday's call:**



## Around the Product Block



### RPM Enrollment for 2024

Real Practice Management (RPM) enrollment is now open for financial professionals that are prepared to go through the vetting process to qualify. All three sessions are required in person to participate as well as homework, peer, and coaching calls on a monthly basis. Candidates will be screened to ensure the program will be beneficial as well as intake benchmarks to verify financial professionals have the desire and time to take their business to the next level.

The RPM coaching program is offered at no charge to qualifying financial professionals. Financial professionals are responsible for hotel accommodations and travel costs to and from each session. Seats are limited to 40 financial professionals per room and are filled on a first come, first serve basis. For questions, please call 800-777-6080 x 3350 or email [practicemanagement@cir2.com](mailto:practicemanagement@cir2.com)

To see the impact RPM has, take a trip down memory lane to our discussion at the [2022 Branch Meeting](#)

### Recap of CLIC New Account Webinar

Thanks to so many of you who attended the webinar last Thursday.

As of this email, I do not have the recorded link but I will let you know when it is published.

In the meantime, head on over to the [Digital Transformation Page](#) to learn more.

[CLICNew! Account Open User Guide](#)

[CLICNew! Account Open Flowchart](#)

[Register for live CLICNew! Account Open training](#)

## 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



### CIM Group

Sean Henderson

Vice President, Private Wealth Partners

Email: [sehenderson@cimgroup.com](mailto:sehenderson@cimgroup.com)

Sean will discuss the market impacts of tougher regulations on the banking sector and the opportunity that has arisen from those regulations for Private Equity real estate and credit managers like CIM Group. This quote from Jamie Dimon encapsulates the current sentiment perfectly - "This is great news for hedge funds, private equity, private credit, Apollo, Blackstone," Dimon said, naming two of the largest private equity players. "They're dancing in the streets."

<https://www.cnbc.com/2023/07/14/dimon-apollo-blackstone-tougher-bank-rules.html>

At CIM Group, we continue to feel private credit is the sector that has the most immediate opportunity for us and the sector we're most heavily focused on. Our expectation is that the real estate sector will start showing more opportunity down the road but currently property valuations are still dislocated compared to current interest rate levels and we expect repricing in that space.

[CIM RACR Portfolio Update](#)

[CMCT Preferred Stock Overview](#)

[CMT Group Overview](#)

[Trade Date Calendar](#)

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