Weekly Rep Call

7/26/2023

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.

August 2nd- DWA 2nd Quarter Review

August 9th- Allianz Life

August 16th- Kristen Civin Cambridge Practice Management

August 30th- Duncan Financial Planning

September 20th- No Call due to Ignite

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.

Click here to see the 2023 Ignite Conference Credits

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

Missouri ESG Disclosure Requirements

On June 1, the Missouri Secretary of State's office published a final rule intended to address concerns with Environmental, Social, and Governance (ESG) investing. The rule is **effective July 30** for financial professionals registered in Missouri, and will require specific notice and consent when recommendations or transactions include consideration of "social" or "nonfinancial" objectives.

Stay tuned for more information to come!

Around the Product Block

New Tax Management WealthPort Tool

On August 1st, 2023. A new trading tool is being introduced, along with updates to existing tools to help facilitate tax efficient trading in your block trading process.

For users on the Tier 5 profile, you will now be able to select specific tax lots to retire from the holdings page within an account, or by using the worksheet trading tool, and uploading tax lot specific trades using multiple order entry. You will also see a new tool, called "Tax Harvest", this new tool will allow you to harvest unrealized gains and losses across one or multiple accounts. You will have the option to harvest all gains or losses or set specific parameters for the amount that you would like to harvest. This tool will also allow you to establish replacement holdings, set restrictions on securities purchased or sold and restrict cash for wash sale protection, all automatically based on your settings.

Access to these new and updated tools requires an additional training and an update to your WealthPort access. The WealthPort Trading Support team has created a new training session and will be happy to help you begin the process of getting your access updated.

To get started, or for more information please contact the WealthPort Trading Support team at wealthporttrading@cir2.com.

Client Cash on The Sidelines Options

Cash is king now and this is the perfect time to begin discussing with clients on ways they can maximize outside of their banks.

FDIC Insurance option through StoneCastle called FICA. 4.5% APY for the first $1M. Sign up at **https://cambridge.advisor.cash/**

Money Market: Vanguard Cash Reserve Federal MM VMRXX, T. Rowe Price US Treasury Money Fund TRGXX, Invesco Premier Portfolio IPPXX, JP Morgan Liquid Assets MM Fund PJLXX, Fidelity Money Market Portfolio Class I FMPXX, Gabelli US Treasury MM Fund GABXX This is not an all exclusive list

Please reach out to me by phone or email to discuss this subject further.

FinTech Webinar

With the latest updates to their Redtail integration, you can simplify data transfers and reduce busy work so you can focus on engaging with your clients.

Join experts from Asset-Map and Redtailon **Tuesday, August 1st at 12pm CT**, for a LIVE webinar to learn how to:

- Optimize your workflow by seamlessly importing client data to Asset-Map from Redtail to create and maintain multiple households, including client contact information and financial instruments.
- Provide insight into both platforms and best practices to enhance client conversations.
- Ramp up your speed to advice

Join their LIVE webinar on Tuesday August 1st from 12-1pm CT to streamline productivity and improve client experience.

CLIC New Account Open Webinar with Thomas Block is LIVE

This recording features Thomas Block, AAMS®, AWMA®, CRPC®, Branch Manager/Recruiter with Duncan Advisor Resources. Click to hear how the Duncan team has adopted and incorporated CLICNew! Account Open into their day-to-day processes, change management, and user experience.

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

StepStone Group

Brian Fitzgerald, CAIA
Director | Mid-Atlantic
Email: Brian.Fitzgerald@stepstonegroup.com

LinkedIn has been a tool for marketers and sales organizations. It is a more superior effective lead generation tool than Facebook or Twitter (now X).
.
But how do you as a financial professional use it effectively?

5 clicks to uncover rollover opportunities with LinkedIn Sales Navigator.

Brian will demonstrate how to customize LinkedIn search to find local executives who have changed jobs in the last 90 days

StepStone SPRIM Fact Card
StepStone SPRING Fact Card

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