Weekly Rep Call

8/2/2023

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 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

Cambridge is further researching the requirements with the state of Missouri. If you are registered there, reach out to me for complete details about what action you need to take under current rules.

Annual Compliance Meeting and Questionnaire Coming Soon

Annual Compliance Meeting (ACM) and Annual Compliance Questionnaire (ACQ) will be available in RegEd later this week. RegEd will send out notifications via E-mail once the ACM and ACQ modules are ready for you to complete. The ACM and ACQ must be completed by October 31, 2023. If you attended the compliance meeting at our branch meeting this spring, you should see your credit applied within the next few weeks.

Around the Product Block

Reviewing Old Annuities

After the recent release of the **LIMRA Second Quarter Annuity sales report**, this is a great time to review annuities that have been on the books 5 years or longer. Enhancements within the

product space, increased caps, new riders makes it an opportune time to review if your clients are getting the benefits they need.
Even if your unsure about how to position a FIA over a RILA or if you have questions about a replacement, your supervision team is here to help.

Jackson Changes coming August 28th

Jackson released it's expected changes to their Perspective II product coming August 28th.

The details are in this **PDF**

Changes to NetXInvestor and Wealthscape Investor Client Account Setup

Changes will be implemented to the client account set up and password reset processes for NetXInvestor and Wealthscape Investor as highlighted below.

- Starting October 1, 2023, your clients will be responsible for creating their own user IDs and passwords, as well as resetting their passwords, for NetXInvestor and Wealthscape Investor. At that time, Cambridge will no longer be providing client login information to financial professional or admin staff. Financial professional's will no longer have the ability to reset their clients' passwords from inside of NetX 360.
- In the event your client has an account that is ineligible for self-registration a form can still be submitted, however login information will no longer be emailed directly to the financial professional. Instead an email on how to set up a Smarsh account will go to both the financial professional and the client, then a second email with the login information will be sent to just the client securely. If you are unsure if your client's account is eligible for self-registration, please reference the Eligible Registration Types resources on the Cambridge Resource Center.
- Self-registration and the ability to reset your own password are functions currently available on both platforms today should you and your clients choose to utilize these features prior to October 1.
- Additionally, multi-factor authentication (MFA), an advanced level of authentication with two or more levels of security factors, will be turned on at National Financial Services (NFS) starting October 1. MFA is already enabled at Pershing and is also currently available within Wealthscape Investor if your clients choose to turn it on.

Cambridge is working to create documentation and resources to assist you and your clients in navigating these changes. Materials will be made available in the Cambridge Resource Center that will continue to be updated as resources are created.

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

Duncan Walsh Advisors

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Chief Executive Officer
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Thomas J. Walsh, CFA
Chief Investment Officer
Email TJWalsh@WalshAssetMgt.com

As a member of a Cambridge Enterprise, you have access to dozens of investment managers for recommendations that fit your clients' needs and goals. Internally, we have a Team-Directed option called Duncan Walsh Advisors. Tune in for a review of the current portfolio strategy, and economic/market metrics DWA monitors for you and your clients**.**

DWA Portfolio Sheets
DWA Client Brochure
About DWA
DWA DWA website
DWA Request for Proposal

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