# Weekly Rep Call

8/9/2023

## 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 16th- Kristen Civin Cambridge Practice Management**

**August 23rd - Cambridge Source Social Media Presentation**

**August 30th- Duncan Financial Planning**

**September 6th- DAR Life Brokerage**

**September 13th- Morningstar Annuity Intelligence Enhancements Demo**

**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
Updates to the original announcement have been posted!

### Cybersecurity Requirements
Cambridge is now also requiring a Written Information Security Program (WISP). For a template that you can use for yourself, click here. For a Cybersecurity Incident Response Plan template, click here.

### Annual Compliance Meeting and Questionnaire
Annual Compliance Meeting (ACM) and Annual Compliance Questionnaire (ACQ) now available in RegEd! If you attended the Annual Compliance Meeting at our branch meeting this spring, be sure to check and confirm that your credit has been applied.

If you have not seen July's Compliance Minute, use the link below!


## Around the Product Block

### Ignite Sneak Peak

Ignite is right around the corner and we can't wait to see everyone in Orlando, Florida, for a few days of networking, learning, and fun! If you are receiving this message, most likely you have already registered for Ignite, but if not, you can still do so and access all the details **here**.
To help you prepare for the event and make the most of your time with us in Orlando, we've scheduled a webinar designed to give you a "behind the scenes" look at what to expect. The webinar will be held on September 7, 2023, at 1:00 p.m. CT

**Register for the preview**

### Two Upcoming Cambridge Webinars on NQDC

Cambridge is hosting a two calls on Non-Qualified Deferred Compensation plans.

Part 1 of the Client Solutions NQDC Educational Series will provide a general overview of the non-qualified plan types, employer and participant benefits, design flexibility; as well as a medley of tax and regulatory design constraints related to participation, benefits, plan distributions.

To register for this call on August 16th 2pm EST, **click the link**

Part 2 of the Client Solutions NQDC Educational Series will review the asset-liability matching strategies employers use to account for benefit liabilities and how financial professionals can help clients informally fund for plan liabilities; as well as some of the accounting, administration and reporting considerations associated with non-qualified plans.

To register for this call on August 23rd 2pm EST, **click the link**

## Morningstar Enhanced Annuity Intelligence Center Tool

Cambridge is excited to announce the launch of Morningstar's Annuity Intelligence Center on August 15, 2023. Annuity Intelligence Center is a redesign of and enhancement to the current Morningstar Annuity Intelligence analyzer tool, which has been accessible to Cambridge financial professionals for many years.

Powered by both Morningstar and Luma, Annuity Intelligence Center will continue to be available through an enterprise-level license to all financial professionals and administrative staff with access to the Cambridge website. This enhanced annuity solution will give financial professionals access to additional product information, research functionality, and suitability analytics for a key asset class.

**See the release for more information.**

## 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

### Allianz Life


**Tyler Lernihan**
**Regional Vice President**
**Email tyler.lernihan@allianzlife.com**


Allianz Fintech Professionals can help you use eMoney/CLIC Advisor advanced planning capabilities to create and present powerful annuity solutions for clients and prospects.

We will show you in a live demo how to incorporate Allianz protected growth and protected income strategies into your E-Money Plans.

Learn how these solutions could potentially improve clients financial and retirement outcomes and also the other Fintech presentations are available.

**E-Money Case Study**
**Advanced Markets Q&A**
**Fintech Presentation Catalog**

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