Weekly Rep Call

8/16/2023

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 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

Fiduciary Review Process

What to do if you receive an E-mail from Cambridge that looks like this:

Case Notification - New Case Created. A new case has been created with the following details:

Case #: 00666399

Client Name:

Department: Fiduciary Services

Topic: Advisory Compliance

Subtopic: CIRA - General

- Respond promptly
- Do **not** respond via E-mail reply
    - Instead, respond to the Case available in CLIC
- Specifically address the items being raised in the case. Some common examples are provided below:

To ensure we're meeting our best interest obligations, one of the following actions should be taken in the next 30 days:

A) Determine what trades may be necessary (in line with the client's goals and objectives), and place trades in the WealthPort account(s). Note: Even after trades are placed, it may be necessary to analyze whether a new trading strategy is needed or if the account(s) should be managed using a ticket charge program.

B) If no trades are in the client's interest, the account(s) should be moved to a brokerage/commission account.

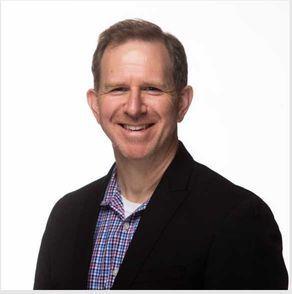
C) If the client has become non-responsive, it may be necessary to close the account(s).

Please contact me, Advisory Compliance, or your Supervisor with any questions or concerns you might have.

Getting Paperwork Missing Emails?

If you have been approached by Cambridge for missing paperwork on older accounts/transactions that you believe paperwork had already been submitted, please reach out to Larry (larryq@cambridgesecure.com). He should be able to help you figure this out.

Around the Product Block



How to Use MyRepChat as an Office Assistant

MyRepChat was created to be a communications platform, not just a texting tool and the features and integrations save an advisor and assistant time. It allows you to schedule, automate efficient client communication—leaving you more time to do what you do best.

Aug 23, 2023 04:00 PM EST

Register here

Engaging and Retaining High Net Worth Client Webinar

Are you considering expanding your client service engagement model to meet the needs of wealthier individuals and families? This session's discussion will focus on the unique financial concerns and expectations when interacting with ultra-high-net-worth individuals and multi-generational relationships.

To register for this call on August 24th 4pm EST, **click the link**

Cambridge Insurance and Annuity Study Group

The newest study group in Cambridge met again this past Tuesday. Our focus was about using fee based annuities in your practice.

We meet monthly, have a **community group set up**, and new members are always welcomed.

Email me if you're interested in joining

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

Practice Management

Cambridge Real Practice Management

Kristen Civin, RCC
Director
Email kristen.civin@cir2.com

Real Practice Management (RPM) is geared toward Cambridge financial professionals who are ready to take the next step personally and professionally. RPM combines one-on-one coaching with interactive group meetings alongside your peers to enhance your existing skills.

Kristen plans to talk about 2024 RPM: contracts are available, locations/dates, and the new intake and self-nomination process. She also plans to highlight a value add offering that her team can assist with: Practice Management Consultations – an hour long call/consultation where they take FPs through important resources on the website, become more familiar with them and their practice, and how her team can potentially plug them into various resources at Cambridge.

These are the 2024 RPM Dates:

Vision and Focus:

- March 18-19 (Hilton Nashville Downtown)
- June 24-25 (Gaylord Rockies)
- October 21-22 (Hilton Nashville Downtown)

Recharge

- March 19-20 (Hilton Nashville Downtown)
- October 22-23 (Hilton Nashville Downtown)

If interested in connecting with a coach about joining RPM or interested in a 1:1 Practice Management Consultation, they can contact our Practice Management team at **practicemanagement@cir2.com**

RPM Video
Practice Management Brochure

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