

Weekly Rep Call

8/23/2023



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.

August 30th- Duncan Financial Planning

September 6th- DAR Life Brokerage

September 13th- Morningstar Annuity Intelligence Enhancements Demo

September 20th- No Call due to Ignite

September 27th- Introduction to YCharts

October 10th- Admin & Solo Practitioner Call 4pm EST

October 11th- Opportunity Zone 101 with Griffin Capital

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



AML Training

Cambridge has advised us that no AML certification will be offered this year. We have found other options that will enable financial professionals in our branch to access free courses elsewhere. For full details, check out our recent branch-wide [announcement!](#)

AdView

Remember that AdView will only be available for access until March of 2024. Please check your active submissions, and resubmit any advertising to Communications Review in RegEd if the materials will still be used following March 14, 2024.

Around the Product Block

Negotiating and Structuring Acquisitions with Cambridge



Cambridge's Succession and Acquisition Solutions Team can be in your corner through the entire process. Bringing years of experience to you and your practice, our team provides consulting in the areas of acquisition strategies, business valuation, deal structure consulting and negotiating, customized document preparation – including often overlooked revaluation provisions – and financing with flexible options.

Access the recent webinar, [Negotiating and Structuring Acquisitions](#), to learn more about what goes into deals and walk through a summary of unique real-life examples with Cambridge First Vice President Kris Emick and Amy Eden Below, Associate Director of Succession and Acquisition Solutions.

Tax Planning: Identifying strategies for clients in three key generations

High-net worth clients can benefit from a range of planning opportunities available under current tax law. Though no strategy is exclusive to a single age group, grouping them by generation may help you consider who's most likely to ask about different strategies and which clients may benefit most from these strategies. Join us for a conversation on different tax planning strategies for clients in three key generations, and how you can have informed conversations with your clients about the planning topics most relevant to them.

To register for this call on September 6th 4pm EST, [click the link](#)

New Account Opening for Pershing

Pershing Alpha testing is expected to begin in late August, submit your information through the link below to indicate your interest in being an early adopter.

[Sign up to participate in CLIC](#)

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 Source Marketing



Ian Bee
Director, Source Marketing
Email Ian.Bee@cir2.com

Cammie Mitchell
Digital Marketing Liaison, Source Marketing
Email Cammi.Mitchell@cir2.com

Wanting an active, engaging social presence but don't have time to create fresh, compelling content? Join Ian Bee, Director, and Cammi Mitchell, Digital Marketing Liaison, of Cambridge Source Marketing as they introduce the newest Source offering- Social Media Management.



This new service will be offered in a variety of subscription-based packages to meet the varying needs of financial professionals. Whether you prefer to have a more hands-on approach to your social profiles, or want to have social media management taken off of your to-do list completely, Source now offers more robust, competitive services designed to help your practice optimize its social media presence.

[Presentation](#)

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