Weekly Rep Call

8/30/2023

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.

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 - BOOK YOUR HOTEL

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

RightBridge 5500s

Ever wonder what the easiest way would be to find a plan 5500? Watch the recording for a tutorial on how to find this in RightBridge

DBA OBAs

Due to a change in Cambridge policy, all DBA names must be submitted as an OBA in RegEd

Around the Product Block

Pacific Financial Group Webinar on SDBA

Review and Update of The Pacific Financial Group's broad range of investment products and services – including the only multi-manager, multi-strategy TAMP for 401k SDBA accounts.

Great way to increase your AUA and revenue!

Sep 7, 2023 04:00 PM EST **Register Here**

Estate Guru Webinar

In this webinar Cambridge will host Estate Guru, a company that provides estate planning tools to help financial professionals create relationships with their clients.

Estate Guru provides an easy algorithm-based platform that allows you and your client to work with a qualified attorney efficiently and participate in the estate planning process. Chris Hall-a company executive for and the featured speaker-will provide insight on how to best introduce and incorporate this system into your practice.

https://www.estateguru.com/

To register for this call on **Sep 13, 2023 04:00 PM** 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

Business Opportunity

Duncan Advisor Resources Financial Planning

Kristen Hull
Strategic Planning Analyst
Email kristen.hull@cambridgesecure.com

John Ferguson
Ferguson Wealth Management
Email john@fergusonpwm.com

Financial Planning – are you ready to accelerate your growth and build a better tomorrow?

Tried, tested, and thriving, we've taken our practice at Duncan Financial Group to a new level by incorporating Financial Planning in our client engagement process.

Clients and prospects are looking for a financial quarterback to understand their picture holistically and provide them with recommendations and guidance for a coordinated, successful future.

There's arguably no better way to deliver on this than a Financial Plan delivered by a team of experts – let us help you take your practice to a new level.

Presentation
Financial Planning Website

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Making It All Work Together