Weekly Rep Call

Duncan ADVISOR RESOURCES
Making It All Work **Together**

9/06/2023

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 13th- Morningstar Annuity Intelligence Enhancements Demo

September 20th- No Call due to Ignite

September 27th- Introduction to YCharts

October 4th- Estate Guru

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

October 11th- Opportunity Zone 101 with Griffin Capital

For Those Going To Ignite 2023

Ignite 2023 – Cambridge's biggest event of the year – is just around the corner. Click to view the full agenda here.

CJ's Compliance Corner

ACQ & ACM

Now available in RegEd! If you attended Todd's presentation at our branch meeting, check to confirm your credit has been applied

Communications Review

Check out the recording for a live demo on creating a new advertising or hard copy correspondence submission

Around the Product Block

Franklin Charitable Giving Program Changes

Franklin Templeton announced that it will be making changes to the Franklin Charitable Giving Program for Donor-advised Funds held with and administered by Renaissance Charitable Foundation, Inc.

The changes will allow Donor-Advised Funds access to a lower fee share class effective September 25, 2023. For further information, please contact Renaissance Charitable Foundation, Inc at 800-843-7997

Summary of changes:

- Class C Shares in the program will no longer be offered
- Class A Shares will be offered in the program at Net Asset Value (NAV)
- Pre-established investment strategies will no longer be offered on new accounts in the program. You can now just only pick the funds geared towards your recommended allocation.

You can learn more about the program, FAQ's, and paperwork by **going here** - Please keep in mind, all documentation references the current program, not the changes happening later this month.

How to do Donor Advised Funds at Cambridge

Cambridge offers flexibility when it comes to choosing a donor-advised fund (DAF) for your charitable clients. The Cambridge Charitable Gift Fund is our white-labeled DAF administered by Renaissance. You may also set up a DAF with a sponsoring charity other than the Cambridge Charitable Gift Fund.

Open a Cambridge Charitable Gift Fund

Open a Donor-advised Fund Elsewhere

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.

One of our enterprise Financial Professionals is getting $7,962 this month from the referral bonus!

Pillars of True Independence
Getting to know Cambridge

Business Opportunity

Duncan Advisor Resources Brokerage General Agency

Robb Stottlemyer
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Jeff Barker
EVP, Life Brokerage Distribution
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Internal Wholesaler
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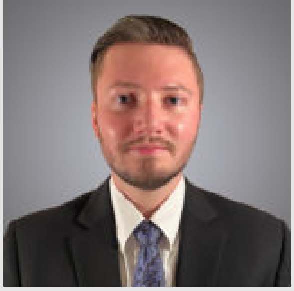
Duncan Brokerage General Agency – are you ready to accelerate your growth and build a better tomorrow?

No matter if your brand new to Duncan Advisor Resource, or a grizzled veteran, it's always good to know what is going on with



your Brokerage General Agency.
During this call, we will review:

- The Sales Desk
- Underwriting Program for A-Level Clients
- LTC Updates
- Success stories from the last quarter

CareMatters Together
RGA Underwriting Program
Life Insurance Awareness Month
Contact Sheet

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