Weekly Rep Call

9/13/2023

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 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

Communications Review

This week we expanded on the topic of what to submit/what not to submit in hardcopy correspondence.

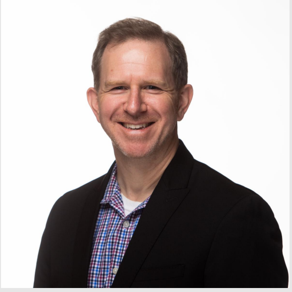
Do submit:
Video content used on social media
Video content sent via E-mail
Video content distributed via other third-party channels
FMG campaigns that contain non-FMG attachments

Do not submit:
FMG campaigns using only content offered through FMG's library

Should you need further assistance or guidance on this complex topic, please contact Catherine directly at:

1.800.517.9901 x2310
Catherine.Lavoie@cambridgesecure.com

Around the Product Block



Buying Precious Metals

Precious Metals trades for both clearing firms are executed at Fidelitrade which is owned by Fidelity.

There is no Precious Metals Agreement on the FCCS side, just on Pershing. On Pershing, they would need that **agreement** booked to the account (can email **Trading@cir2.com** and you will get it booked to the account) before any trades of precious metals are done in a Pershing account. Any trades of precious metals need called into the desk at 800-756-8115.

PERSHING:

- All precious metals trades must be made through the desk via phone call from the advisor
- Trades must be placed before 3:00 pm EST
- You can find any pricing and the available products on Fidelitrade.com or BullionValues.org.

FCCS:

- All precious metals trades must be made through the desk via phone call from the advisor
- Trades must be placed before 3:00 pm EST
- Pricing and products can be found on fidelitrade.com.

Details about how to buy and sell on each can be **found here**

Cambridge Page
CUSIPS

Changes to Client User ID Setup and Password Resets

Starting October 1, 2023, your clients will be responsible for creating their own user IDs and passwords, as well as resetting their passwords, for NetXInvestor and Wealthscape Investor. At that time Cambridge will no longer be providing client login information to financial professional or admin staff. Financial professionals will no longer have the ability to reset their clients' passwords from inside of NetX 360.

In the event your client has an account that is ineligible for self-registration a form can still be submitted, however login information will no longer be emailed directly to the financial professional. Instead, an email on how to set up a Smarsh account will go to both the financial professional and the client, and a second email with the login information will be sent to the client securely.

In the event a form is submitted to update an existing user ID to request an account, or for an additional person be added, or for Pershing accounts to request e-delivery preferences be updated, no follow up email will be sent to the financial professional or the client, but a PSM note will be sent letting the financial professional know that the form has been processed and completed.

NetX Setup
NetX FAQ
Wealthscape Setup
Wealthscape FAQ

Cambridge has created documentation and resources to assist you and your clients in navigating these changes. Materials are available in the Cambridge Resource Center, and these resources will continue to be updated. **The materials within the Cambridge Resource Center can be found by going onto cir2.com and selecting Cambridge Resource Center in the black banner across the top of your page. Once on the Welcome page, click 'Brokerage Operations' then 'Self Service.' From the 'Financial Professional and Client Self-Service Options' page**, navigate to the General section where you will see Client Access with a link for both Wealthscape Investor and NetXInvestor.

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]

Practice Management

Cambridge & Luma Financial Technologies

Casandra "Casey" Psyk
Senior Annuity Liaison
Email Cassandra.Psyk@cir2.com

David Perkins
Manger - Annuity Products
Email dperkins@lumafintech.com

Real Resources for your Annuity Business at Cambridge

On the call, you'll meet Casey who is a tremendous resource on all things annuities within Cambridge. Learn how you can use her expertise for annuity cases.

Also, David from Luma will give you a walkthrough on the recent overhaul of the Morningstar Annuity Intelligence Tool.

Larry L. Qvistgaard, II
President, COO
Duncan Advisor Resources
215 Avenida Del Mar, Ste. B, San Clemente, CA 92672
T 800.517.9901 x2230 C 949.306.0060 F 707.676.8633
www.duncanar.com

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