Weekly Rep Call

9/27/2023

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.

October 4th- Estate Guru

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

October 11th- Opportunity Zone 101 with Griffin Capital

Did you go to Ignite?

We had an amazing time with the 60+ Financial Professionals and their guests. If you have pictures to share, please email them over to thomas.block@duncanar.com

CJ's Compliance Corner

Ignite Takeaways

-Top 3 Exam Priorities:

Trusted Contact
Marketing Rule
Compliant Communication

these are being aggressively enforced, and we continue to see regulation by enforcement

-Cybersecurity
-Documentation

Upcoming & Recurring

RightBridge admin access is coming! Stay tuned for the official Cambridge announcement with further information.

Admin/Solo Practitioner Call scheduled for October 10th - save the date and be sure to join us!

Compliance Minute now available for the month of August!

Around the Product Block

New FIA's and Approved MGA

Cambridge has approved two new FIA's to the platform.

Eagle Life: Guaranteed Flex 5
Eagle Life: Guaranteed Flex 5: Product Profile
Eagle Life: Guaranteed Flex 5: Brochure

North American: Prime Path Pro 10
North American: Prime Path Pro 10: Brochure

TruChoice was an approved MGA added to the network. Be aware that at some point, the Annuity Disclosure form will be updated. We will keep you informed of when that happens.

Ignite Nuggets

Product Spreadsheet:
This was done awhile back for Annuities **https://www.cir2.com/investment-choices/offerings/annuities-new/** and the page has recently been updated so take a look. The spreadsheet was so well received, that it is being worked on in the Alternative product space. Keep an eye on communications in the coming months about that.

Acquisitions:

If you are looking to grow your practice through acquisitions, there are resources I have available to help you. Schedule time with me to discuss what you're interested in -> **https://calendly.com/thomas-block/30min-1**

New products on the way:

Work is underway to bring private placement Annuities and VUL's to the shelf. There's still a lot more compliance to work through but the OSJ team is working closely with Cambridge on this rollout.

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 scheduled to get $9,600 in late October

[Pillars of True Independence]
[Getting to know Cambridge]

Practice Management

YCharts

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A deeper, better dive into asset management research

YCharts was founded in 2009 to democratize investment research. From humble beginnings, YCharts has grown to become an all-in-one platform for investment research and client communication. Tune in for a personal introduction into the tool, how it improves investment research efficiency in your practice, best practices in showing your clients the reports, and personal stories from your financial professionals who use it.

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