Weekly Rep Call

10/04/2023

Duncan
ADVISOR RESOURCES
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.

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

October 11th- Opportunity Zone 101 with Griffin Capital

October 18th- Cambridge Source Business Consulting Program

October 25th- Sarah Williams CreateiveOne: The Power of AI

November 1st- **Venture Capital Investing 101 for Retail Investors by Private Shares**

November 15th- **Unlocking ChatGPT presented by BC Partners**

Exclusive YCharts Access

Per our discussion Wednesday, YCharts would like to extend an offer only available to Advisors affiliated with Duncan Advisor Resources - the opportunity to trial their new Presenter Tier license from now, until Friday, December 31st, 2023, for free.

To get this incredible offer, please email Steve Svetlick ssvetlick@ycharts.com to get registered today

CJ's Compliance Corner

Compliant Communications

This is a top exam priority, and we see news stories about firms being penalized on a regular basis. Remember that you must be communicating compliantly with your partners and staff as well as your clients. There are two instant messaging solutions available:

- **Microsoft Teams**
- **Slack**

Regardless of which software is used, you must contact Cambridge to have the monitoring capabilities enabled - this does carry a cost.

For a free alternative, you are also able to use your **compliant texting solution** to facilitate inter-office communication.

Around the Product Block

CAAP changes and updates to Wrap App

Cambridge has updated the WealthPort Wrap Client Agreement and Application, effective September 28, 2023. The new version dated 091823 includes the following:

- Morningstar Tortoise Managed Account MLP has been removed (see CA-23-100)
- Morningstar Hare Managed Account MLP has been removed (see CA-23-100)
- State Street Risk Assist Models have been removed (see CA-23-101)
- Symmetry Risk Assist Models have been removed (see CA-23-101)

These are material changes, the WealthPort Wrap Client Agreement and Application version dated 060823 will continue to be accepted through October 30, 2023.

As of October 31, the WealthPort Wrap Client Agreement and Application version dated 091823 will be required and the older version dated 060823 will no longer be accepted.

New Fee Based Annuities Added

Protective Investors Benefit Advisory VA
A few highlights and documents below:

- Income rate that does not drop if the account value drops to 0
- Spousal Continuation
- Nursing Home enhancement up to 10% on the income rider

Product Highlights
Investors Guide
Product Profile

Equitable SCS Income Advisor

Not technically new, but not is approved as "free friendly" meaning your fee can now come directly out of the contract. I've attached all the details below about the contract.
SCS Income Fact Card
Strategies Flyer
SCS Income Top Reasons

New NetxInvestor and Wealthscape Investor User ID setup is live

Please reference the details in this news story on the change that began this week.
https://www.cir2.com/news-and-events/communications-from-cambridge/bulletins/caap/CA-23-98-important-updates-for-wealthport-forms-092823/

Upcoming Office Solutions Workshops

Join Cambridge for their Office Solutions Workshop (OSW) virtual event from the comfort of your own workplace. Learn how they can help you grow your practice while remaining compliant, increase your efficiency, maximize your time, and cultivate lasting relationships with your clients.
To see the available topics and to sign up, click the link -> **https://www.cir2.com/news-and-events/education-and-events/events/office-solutions-workshop-101723/**

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.

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

Estate Guru

Chris Hall
Business Development
Email chris@estateguru.com

Grow your business with estate planning

Our mission is to empower advisors and attorneys to grow their business with best-in-market tools that are reliable, compliant, and easy to use.

With thousands of satisfied clients under our belt, we knew estate planning could be simpler and smarter. That's why we brought together the best of the best: techies, lawyers, financial planners, and visionaries, all working toward the same goal—to create a tool that would streamline estate planning for advisors, lawyers, and institutions, without losing quality and experience.

Tune in to hear the details on how this Cambridge promoted service works.

Estate Guru Pricing
Presentation
Website

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