

Weekly Rep Call

10/11/2023

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 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

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

Join Steve for a training call Thursday October 12th 2pm EST. [Zoom Link Here](#)

CJ's Compliance Corner



FINRA CE

Due annually by December 31st!

[Sign up/Login/Instructions for launching your CE course](#)

AML/ACQ/ACM

The Cambridge AML (Anti Money Laundering) requirements will be satisfied through completion of your FINRA CE above. However, some insurance carriers may require you to take a separate course to meet their individual AML certification standards. For information on how to access free AML certifications, click [here!](#)

Annual Compliance Meeting (ACM) and Annual Compliance Questionnaire (ACQ) [available in RegEd](#) and **due by October 31st!**

If you attended the Annual Compliance Meeting at our branch meeting this spring, be sure to confirm that credit has been applied in RegEd

Accounts Periodic

As was foretold [on a rep call](#) earlier this year, the Q3 implementation of the accounts periodic module has officially arrived! Like trade review, this will include system-generated alerts that require your response, so please be sure to check it regularly. For a selection of resources that can help familiarize you with the process, see below:

[Account Periodic Review Guide](#) – Access and functions

[Account Periodic Review](#) – Best practices & flag definitions

[Account Periodic Review Demo](#) – Video guide

RightBridge Updates

We asked, and Cambridge delivered! Admin access is now LIVE

for the RightBridge tool! Trainings are available in Knowledge Center University, and can be accessed by clicking [here](#):
(the courses below can be found by searching “RightBRIDGE”):

- RightBRIDGE Training: Overview
- RightBRIDGE Training: Product Profiler
- RightBRIDGE Training: Investment Wizard
- RightBRIDGE Training: Annuity Wizard

Around the Product Block



YCharts Training

Regardless if you've taken up the offer for the free trial of YCharts, they are hosting an education seminar about this particular access Thursday October 12th at 2pm EST.

Access the live event by [clicking here](#)

Alts One Source

Cambridge has created a spreadsheet with all of the approved Alternative Investments called Alts One Source.

To view the spreadsheet, [click the link](#) to navigate to the CIR2 page and you'll see the hyperlink after the 3rd paragraph.

Do not save the spreadsheet since it constantly gets updated.

Requesting a Digital Media Review

Did you know Cambridge's Practice Management Team will provide feedback on your website and social media to help you identify goals and learn how to achieve desired results? It can be challenging to know if you are reaching your intended audience, or if you have a good mixture of educational pieces, hobbies, and community involvement content.

Contact them to see if you are achieving your desired reach and learn about minor adjustments that can be made to enhance your digital presence. They will also provide examples of offices that are succeeding in this space, and talk about vendor and in-house options to take your media to the next level.

For questions and to learn how to leverage these opportunities, please contact Practice Management at 800-777-6080 x3350 (practicemanagement@cir2.com).

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



Griffin Capital

Nick Rosenthal
Co-Chief Executive Officer

Nino Balduzzi
Senior Vice-President
Email nbalduzzi@griffincapital.com



Private Real Estate Update and Outlook

As interest rates continue to be the main topic of discussion when it comes to the housing market, how is that translating into the other parts of real estate.

Listen in as CO-CEO Nick Rosenthal gives the broad outlook for real estate, talking points for your clients, and how you can utilize Griffin for diversification opportunities in this sector.

If you're looking to leverage Griffin's expertise and connect to more CPA's, they provide a great Continuing Education workshop about Opportunity Zone's. Contact Nino to get that set up. Advertising Compliance would just need to see the invitation being sent out and a copy of the presentation.

[Presentation](#)
[Qualified OF Timelines & Deadlines](#)
[CPA CE Seminar Invite](#)

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