

# Weekly Rep Call

10/18/2023



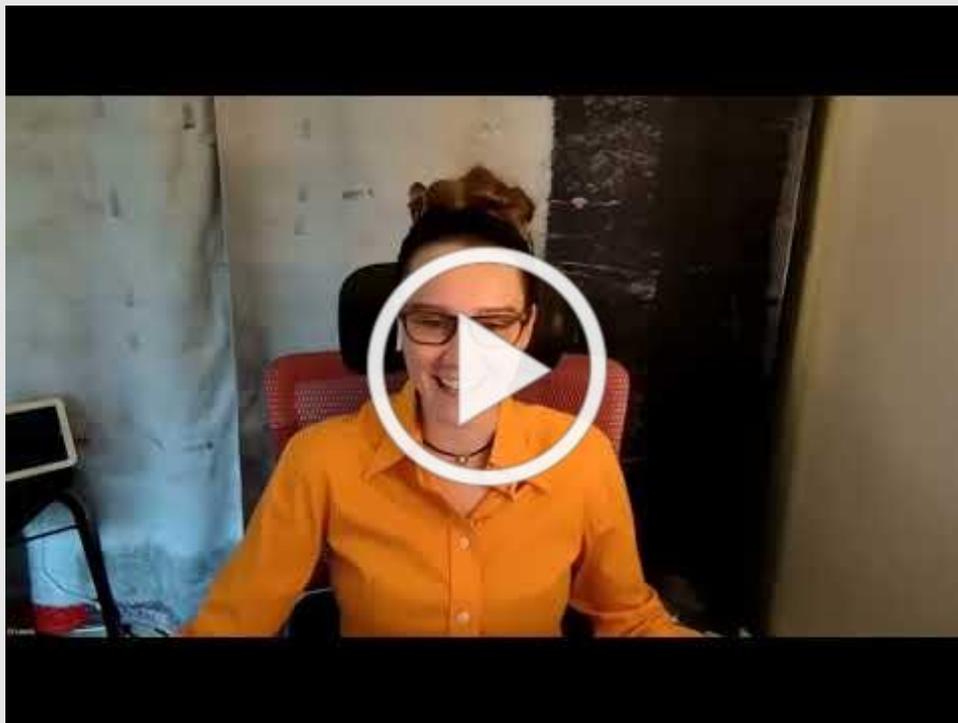
Making It All Work Together

Annual Compliance Meeting (ACM) and Annual Compliance Questionnaire (ACQ)  
Available in RegEd and ***due by October 31st!***

## 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 25th-** Sarah Williams CreateiveOne: The Power of AI  
**November 1st-** Venture Capital Investing 101 for Retail Investors by

**November 8th-** Dave Duncan and Tom Walsh 3rd Q DWA and Market Review

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

**November 22nd-** Larry's 2024 Business Planning Session

## 2024 Annual Branch Meeting

We are excited to announce that the 2024 Annual Branch Meeting will be held at the beautiful **Omni Amelia Island** in sunny Fernandina Beach, FL . This meeting is designed to meet the needs of our financial professionals and will offer educational sessions on products, marketing and sales, marketplaces trends, and more. Plus a backdrop of the beautiful sunrises.

We are sending this communication out early for some important logistical items to pay attention to:

1. Flying into Jacksonville Airport is your best option
2. There is a PGA tournament that weekend - Review your travel options now
3. If you need a rental car, we would recommend getting that reserved now since those will be taken quickly with the tournament

We are looking forward to hosting you for this annual tradition like no other!

### CJ's Compliance Corner



#### Google Business

Cambridge is excited to announce Google Business approval for use in marketing by financial professionals. Beginning October 10, 2023, financial professionals can claim their Google Business profiles, include links to their Google Business page in marketing materials, and share reviews received. For full details on how to get started, click [here](#) to view the compliance alert

#### Marketing Rule

The rule has been the top concern for compliance staff for three years, according to surveys by the Investment Adviser Association. Fines have been levied against several firms, and it is important to comply with the new regulations. For more details, check out the [resource page dedicated to the SEC Marketing Rule on CIR2.com](#)

#### Ignite

Couldn't make it to 2023 Ignite, or looking to re-live some of the magic? Recordings of 2023 Ignite mainstage presentations are now available on Knowledge Center University (KCU). To access the

recordings, visit [KCU](#) and search “2023 Ignite” to see a list of available presentations. Alternatively, click the “Ignite 2023 General Sessions” hot button on the KCU homepage.

## Around the Product Block



### Alts One Source (Update)

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

Based on feedback, they have made it easier to see on the Alternatives pages.

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

Currently, it does not list certain available categories like 1031's and Oil/Gas programs. I am working with Cambridge to get it updated.

Do not save the spreadsheet since it constantly gets updated.

### Cambridge Annuity & Insurance Study Group

Big thanks to Robb Stottlemeyer for being the guest speaker the last two months discussing Long Term Care. Robb is a valuable resource here at Duncan and if you need help in that arena to closed cases, reach out to him.

If you're interested in joining our study group, send me an email.

### 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

### Cambridge Source - Business Consulting

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## Ready to perform in 2024 and Beyond?



Financial professionals work hard in their business to find the right balance of clients, efficiencies, and profitability to give clients the highest level of service utilizing a team approach. Discover how Cambridge Source Business Consulting can provide an in-depth and customized approach to help you streamline your practice.

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[Client Review Current State](#)  
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