



Making It All Work **Together**

## Quarterly Admin and Solo Practitioner Call

**THANK YOU** FOR JOINING US!  
**SAVE THE DATE FOR NEXT TIME**  
Add to your calendar: January 9th, 4pm - 5pm ET



## TODAY'S Q3 CALL AGENDA

### RESOURCES

(links are best viewed after logging into [CIR2.com](https://CIR2.com) first)

#### **Forms**

The Forms section of CIR2.com has more than just a link to the [Forms Wizard](#). Stay up to date on changes to forms [here](#) by clicking "Recently Updated Forms". Bonus! This page has another helpful list: [forms that require OSJ supervision](#)

#### **Account Periodic**

[Account Periodic Review Guide](#) – Access and functions  
[Account Periodic Review](#) – Best Practices Guide and flag definitions  
[Account Periodic Review Demo](#) – Video Guide

**FINRA Annual CE** (due by December 31st)

[Sign up/Login landing page with instructions for launching your CE course](#)

**RightBridge** (now with **admin** access!!)

Trainings available in Knowledge Center University can be accessed [here](#)  
(trainings can be found by searching "RightBRIDGE"):

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

**RegEd Communications Review**

[User Guide](#)

[Recorded webinar](#)

**CLIC New! Dashboard**

[CLICNew! Dashboard Written Overview](#)

[CLIC New! Blotter User Guide](#)

[CLIC New! FAQs](#)

[Register for a CLIC New! Dashboard training LIVE session](#)

## **\*\*HOMEWORK\*\***

Due by next call (January 2024)

### **CLIC New! Dashboard**

Start using the software and get familiar with the system.

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***\*Opportunity for Extra Credit\****

Submit an idea for a Dashboard improvement [here!](#)

-or-

Demo one of your favorite ways to use the Dashboard on our next call!

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Admins must enable access using the CLIC Enrollment Form  
(\$50/month flat cost per admin, can access multiple FPs)

Please contact Greg Hicks for assistance with completing this process

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**Greg Hicks**

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