Weekly Rep Call

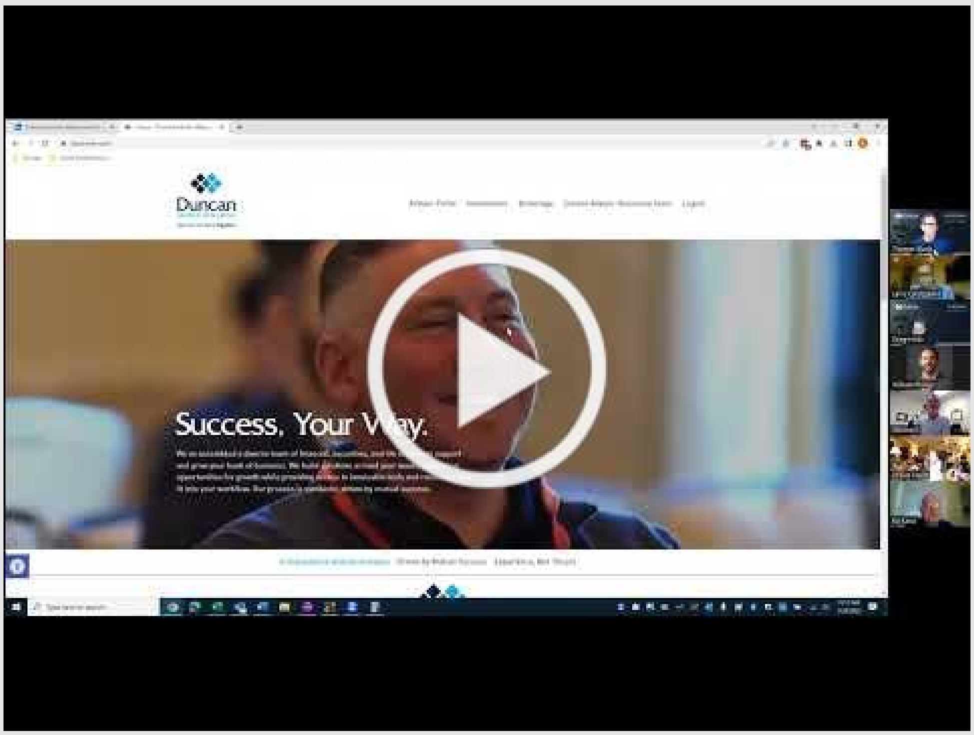
11/08/2023

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.

November 15th- Unlocking ChatGPT presented by BC Partners

November 22nd- Larry's 2024 Business Planning Session

November 29th- A Review of Practice Lab by Capital Group

SPECIAL CALL December 7th 1pm EST- Bond Buying 101 with AAM

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!

Greg's Groovy Compliance

Accessing Previous Calls

When there's a need to access our enterprise calls, make sure you go to https://duncanar.com/membership-login/ and click the webinars/rep-calls under the investments tab. There you can see anything we've recorded and search by topic to get the details, like getting your AML certificate.

Annual Registration Renewal

Be on the lookout soon for your official 2024 registration renewals email.

Around the Product Block

Amy Webber Interview - Part 2

My Spotlight on Success is geared toward our enterprise Financial Professionals, but this month I changed it up and interviewed Cambridge's CEO Amy Webber.

Part 2 can be found on the DAR LinkedIn site here ->

https://www.linkedin.com/feed/update/urn:li:activity:7128010814967463938

Part 1 in case you missed it, is below. Share the post, leave a comment, email me what you thought of it.

https://www.linkedin.com/feed/update/urn:li:activity:7125458982818721792

Bond Laddering article

During the call, Larry mentioned a bond laddering article.

Here it is -> **https://www.morningstar.com/funds/bond-ladder-etfs-can-help-investors-climb-higher-2**

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

Business Opprotunity

Duncan Walsh Advisors

David Duncan, CFP
Chief Executive Officer
Email david.duncan@cambridgesecure.com

Thomas J. Walsh, CFA
Chief Investment Officer
Email TJWalsh@WalshAssetMgt.com

As a member of a Cambridge Enterprise, you have access to dozens of investment managers for recommendations that fit your clients' needs and goals. Internally, we have a Team-Directed option called Duncan Walsh Advisors. Tune in for a review of the current portfolio strategy, and economic/market metrics DWA monitors for you and your clients.

DWA Portfolio Sheets
DWA Client Brochure
About DWA

DWA website
DWA Request for Proposal

Larry L. Qvistgaard, II
President, COO
Duncan Advisor Resources
215 Avenida Del Mar, Ste. B, San Clemente, CA 92672
T 800.517.9901 x2230 **C** 949.306.0060 **F** 707.676.8633
www.duncanar.com

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