Weekly Rep Call

11/15/2023

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.

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

Annual Registration Renewal

This went live on Tuesday. Listen in as Greg walks through how to selected new states as well as remove existing ones from your invoice.

Please complete this by December 13th

Around the Product Block

Nationwide's Changes to their Annuities

Here's a summary of those changes plus attachments. Feel free to ask me how to get in touch with your local wholesaler.

- Nationwide L.inc+ Empire and L.inc+ Empire Advisory, the newest additions to the L.inc+ suite exclusively for New York, offer investors guaranteed income that lasts for the rest of their lives – even if their contract value falls to zero. They also allow clients to invest up to 80% in equities. This is available on the Destinations 2.0 and NARIA Nationwide Advisory Retirement Income Annuity product in New York
- Payout percentages are increasing by 5 – 20 basis points at key retirement ages on Nationwide L.inc+ Core, L.inc+ Core is a rider for clients seeking consistent and predictable retirement income that will not decrease even if their contract value goes to zero.
- L.inc+ Accelerated payout percentages are increasing by 5 – 30 basis points. Accelerated is for clients who want more income early in retirement and a wider range of investment

options, including the ability to invest 100% in equities

- Payout percentages are increasing by 10 – 20 basis points at key retirement ages on L.inc+ Max. L.inc+ Max is a rider for clients who expect to need most of their income in the early years of retirement. It also allows clients to invest up to 100% in equities. This for the Destination B 2.0 product
- New option to add L.inc+ Core Advisory and L.inc+ Accelerated Advisory to NARIA further solidifying the company's position as the industry leader in the Advisory space

NARIA Brochure
Linc+ Core
Linc Empire
Linc+ Accelerated
Team Map

Part 3 Webinar on Non Qualified Deferred Comp Plans for Executives

In this third and final session of the series, webinar participants will get to see "success in action" as Client Solutions hosts your peers from Legacy Advisory Partners. Case studies will be used to demonstrate how various NQDC solutions were designed and delivered to corporate clients. Register today to learn more about the enhanced value position that you can bring to clients, as nonqualified plan professional.

Nov 28, 2023 02:00 PM EST. Registration is here

Part 1 -> **https://www.cir2.com/news-and-events/education-and-events/events/nonqualified-deferred-compensation-educational-series-part-1-plan-design-081623/**

Part 2 -> **https://www.cir2.com/news-and-events/education-and-events/events/nonqualified-deferred-compensation-educational-series-part-2-regulation-administration-082323/**

Product Thoughts for 2024 - SDBA and Recordkeeping 3rd Party Options

Listen in as I give product advice on Self Direct Brokerage Accounts and Recordkeeping options for your clients. These options will create more ease of doing business, strengthen your client relationships, and reduce the number of transaction flags from your OSJ team.

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 got over $9,000 last month

Pillars of True Independence
Getting to know Cambridge

Business Opprotunity

BC Partners

Ted Segal
Director of Investor Relations, Credit
Email Ted.Segal@bcpartners.com

Shaan Saigol
Director, Credit Investor Relations
Email Shaan.Saigol@bcpartners.com

Unlocking ChatGPT's Potential: Practical Uses for Financial Advisors

As you continue to plan for 2024, how can you use ChatGPT to save you time.

- **Write your marketing materials for clients and prospects**
- **Brainstorming prospecting ideas**
- **Summarize a book or an article into bullet points**

There's a lot it can do. Tune to hear in details the best practices on leveraging this AI program for your business.

Presentation
ChatGPT Cheat Sheet
Fact Sheet

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