

# Weekly Rep Call

11/22/2023



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**

## 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!

# You can Register Today! You can get your Hotel Room

## Upcoming Rep Calls

Rep calls are happening every Wednesday and we are working hard to fill the schedule.

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

**December 6th- Bill Good Marketing with Stephanie Peterson Head of Growth**

**December 13th- Nitrogen Wealth with Daniel Michaelsen**

**SPECIAL CALL December 7th 1pm EST- Bond Buying 101 with AAM**  
[Zoom Link](#)  
[Outlook Calendar Reminder](#)

**December 20th- NO REP CALL**

**December 27th- NO REP CALL**

## Upcoming Compliance Deadlines:

### Important Registration Renewal Dates

November 14, 2023	Renewal invoices available from the CLIC <sup>®</sup> dashboard
December 13, 2023	Deadline for all registration changes, including notification of full terminations effective December 31, 2023
December 26, 2023	FINRA shutdown through January 2, 2024
January 12, 2024	Compensation debiting

## Practice Management



### Duncan Advisor Resources

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I'm sure you've been doing a lot of planning:

- Turkey
- Mashed Potatoes
- Pumpkin Pie

- 2024 Business Plan

It's not too late to get your 2024 Goals and Plan in order! Bring an extra plate and enjoy this Zoom Session on Goals and Planning for your business. What I hope to accomplish from this short meeting will drive you to:

- Develop your Purpose Statement – Why you do what you do
- Develop a list of Goals and Action Plans
- Develop a Marketing Plan
- List Monthly Objectives

[Why Create a Business Plan](#)  
[Guidelines to Creating a Business Plan](#)  
[Business Plan Example](#)  
[Client Segmentation](#)  
[Defining Your Market](#)  
[SWOT Analysis](#)  
[GOST Strategic Planning](#)

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