Weekly Rep Call

11/29/2023

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.

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

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 Today

CJ's Compliance Corner

New Registration Rules

Annual Registration Invoices due soon! There have been changes to the registration requirements for certain types of business, and we covered this on a recent rep call If you were unable to join us live, be sure to check out the call recording from November 15th here!

FINRA CE

Reminder - your regulatory continuing education is now due by December 31 of each year. Please take a few minutes to create a login and review the CE instructions available on the FinPro website.

Accepting client instructions via E-mail

As stated in the Compliance Manual, “It is Cambridge policy for financial professionals to verify requests for money or funds movement or banking instructions verbally or in person with their clients." In a recent **compliance alert**, Cambridge would like to remind you and your staff to always verify your client's email instructions either verbally or in-person.

Around the Product Block

Bond Buying 101 Webinar

Join David Gingrich from Advisors Asset Management on December 7th 1pm EST, as he discusses the credit market in a way that will help you understand it better as you make these recommendation to you clients.
Link to the meeting is above in our calendar of events.

Bamboo Marketing Upgrade

Under the previous policy, all materials obtained through the Bamboo system were required to be resubmitted through the Communications Review Tool in RegEd by each individual user. Adding Bamboo to the approved vendors list removes this additional step and allows financial professionals using Bamboo content to bypass the individual review steps. These changes are effective immediately.
Bamboo is a digital marketing upgrade available within the CLIC Advisor system. You may upgrade to Bamboo so that you can apply the latest marketing strategies to elevate your brand and build your digital marketing presence. Once upgraded, you will gain access to a marketing toolkit of over 2500 relevant marketing pieces that will help you attract, nurture, convert, and retain clients in any stage of life.
For questions about Bamboo, please contact the Client Solutions Team (clientsolutions@cir2.com) at 800-777-6080

Cambridge Retirement Plan Academy Webinar

Many small business owners look to financial professionals for assistance in asset accumulation, mission-critical employee retention, and business succession planning. While we often first look to qualified plan solutions to solve for these needs, we can't overlook the non-qualified solutions that can contribute to future financial freedom for owners of pass-thru tax entities, like s-corporations.

Join Nicole Hinman, Senior Director of Retirement Plans at Cambridge and Randy O'Brien, Managing Partner and Founder at CRS, to explore ways we can use non-qualified plan designs to help owners of pass-thru entities accumulate retirement assets, enhance the business succession plan, and incentivize key employees.

Dec 5, 2023 04:00 PM EST **Register Here**

Cashiering Best Practices

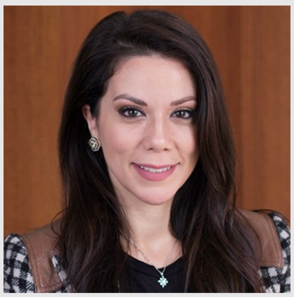
The Cashiering Best Practices has been updated in the Cambridge Resource Center in CLIC®. Access this on cir2.com by first navigating to the Cambridge Resource Center in the top ribbon, selecting the Brokerage Operations honeycomb, and then the Cashiering honeycomb. The Cashiering Best Practice resource is at the top of the page and includes information about required minimum distributions (RMDs), making funds available, signature requirements, bank document requirements, and more.

Practice Management

Capital Group

Bill Gilmartin
Vice President
Email **bill_gilmartin@capgroup.com**

Wassan Kasey
Practice Management Consultant



Interested in growing your practice at double the rate of our peers?

In Capital Group's Pathways to Growth: 2023 Advisor Benchmark Study, we surveyed more than 1,500 advisors to answer the question: Why did some practices grow 144% more than others? Our research identified certain actions and practice management behaviors that helped drive growth across the board, for all kinds of practices.

We categorized these higher-impact activities within three distinct groupings, or pathways. Understanding what these paths are and how they relate to each other can help you rebalance your time and energy toward growth-related behaviors.

Tune in as Bill and Wassan review the FREE Practice Lab tools at our fingertips to help you plan for a successful 2024.

Bill's Bio
Wassan's Bio
Capital Group Practice Lab
Benchmark Report
Lifetime of Value
Relatability Worksheet

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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