Weekly Rep Call

December 13th, 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.

December 20th- NO REP CALL

December 27th- NO REP CALL

January 3rd- 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

End of year housekeeping:

- FINRA CE - Due by December 31st
- Registration Renewals - Due by December 13th
- Cashiering cut-off dates
- NFS/FCCS gifting cut-off dates
- NFS/FCCS year-end processing deadlines
- Pershing year-end processing deadlines
- Pershing annual inactivity fee
- Pershing tax and year-end statement enhancement
- Cambridge 2024 Holiday Schedule

Off-channel Communications

As a reminder, all text communications must be retained and supervised by Cambridge. This includes appointment text reminders such as those sent by common calendar booking service providers like Calendly. Text reminders from Calendly cannot be properly archived and are not approved for use. Cambridge has approved the use of Microsoft Bookings and GReminders, with solutions for texting reminders available. If you use Calendly, please check your setting to make sure text reminders are not enabled

Around the Product Block

New Cottonwood Preferred Stock

The newest Reg D offering from Cottonwood is now available. This Series A Convertible Preferred Stock is a subscription offering with a 8% annual distribution paid monthly.
More details about the offering can be seen here

Lord Abbett Retirement Webinar

Please join Brian Dobbis, Retirement Solutions, Lead, and Alex Mink, Product Specialist, as they explore the changing regulatory landscape and provide an analysis of the legislative and regulatory developments affecting retirement plans, IRAs, Health Savings Accounts, and educational accounts. They will dissect the maze of rules that apply to new SECURE Act 2.0 provisions, lifetime-and-beneficiary minimum distribution requirements, and year-end planning strategies, while also providing potential investment opportunities to build for the future.

good for 1 CFP or CIMA CE Credit

Register Here

Finding our Rep Calls

All of our rep and specialized calls this year can be found on duncanar.com under the Investments drop down.
If you have never logged in, email me so we can get you access.

Cambridge Recruiting Update

Cambridge has announced the 4% recruiting bonus will continue in 2024. As a reminder, by submitting a referral to me, if they join Cambridge within 12 months, you will get:

- 2% of the verified production
- 2% of the actual first 12 months production
- Max $50K

All I need is a few minutes of your time for the details on the recruit. Send me an email with potential candidates for 2024.

Practice Management

that change people's lives.

Advisors using the Nitrogen growth platform have improved prospect close rate from 40% to 94%. When prospects see the power of risk alignment working in their favor, advisors quickly close deals.

- Manage expectations – Pinpoint an investor's exact risk tolerance without stereotyping and turn fearful clients into fearless investors.
- Generate leads – Turn your website into a client acquisition machine by leveraging powerful risk analytics to assess the Risk Number® of a prospects' outside holdings.
- Create ACAT form moments – Watch ACAT forms get signed faster than ever before when you evaluate portfolio risk and make investment recommendations that demonstrate alignment.

Useful resources:
1. Check out the 15 minute **Client Facing Guided Tour**.
2. Attached are some sample reports but **"This"** is a link to show you our soon to be reporting add on.
3. **Here is the compliance backend**, called Command Center.
4 **Here is the study** I mentioned on call so you can check sources out!
5 Here is a **video of using annuities** in the tool.

Here are several case studies that are geared toward how Nitrogen is used to close business.
1. **Advisor closes 8 figure client with Nitrogen.**
2. **1.2b RIA Redhalk Wealth** generates 25% more AUM per year using Nitrogen.
3. **Acorn Wealth uses Nitrogen**, Emoney, Morningstar and more
4. RIA Burgess Wealth **passes Audit in record time** because of Nitrogen.

Duncan AR video
Portfolio stats comparison
Portfolio review
Security Overview Report

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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