

Weekly Rep Call

1/10/2024

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):



Regulatory Changes

- ❖ FINRA CE now due annually
- ❖ Social Media
 - ❖ Cambridge-approved social media channels include Facebook Business, LinkedIn, Instagram, and X (Twitter)
 - ❖ profiles must be approved for Compliance Advertising and linked to Smarsh for monitoring
 - ❖ All licensed individuals (administrative and active financial professionals) required to complete training through Knowledge Center University within 30 days of the course being assigned. Ongoing training required annually, whether using social media or not
 - ❖ Video and Social Media Quick Reference

Current process:

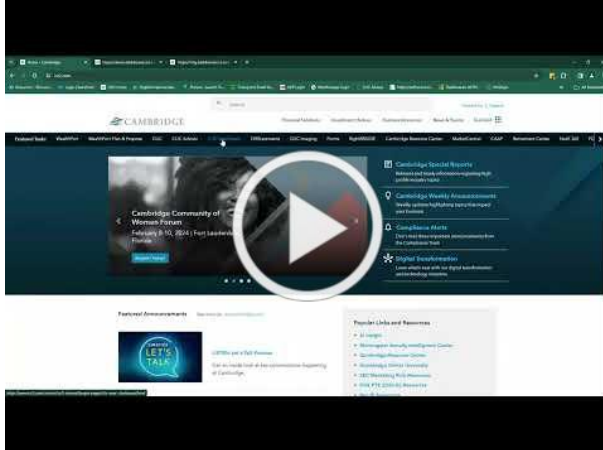
Current process (in effect starting June 01)	
1. Social media post drafted	1. Training completed (annually)
2. Social media post content submitted to Compliance Advertising for review	2. Social media post created/posted simultaneously
3. Following approval, content can be posted on social media profiles	3. Postback completed by Supervisor in Smarsh

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

January 17th- NEW Ascensus Advanced Sales Call Center

1/9/24 Admin and Solo Practitioner call video



This quarter, we were joined by Jennifer Searcy of the Cambridge Digital Implementation Liaison team. Watch the recording for a comprehensive demonstration of the CLIC New! Dashboard, including an interactive Q&A with our attendees!

2024 DAR 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

Don't forget to register for BOTH!

Practice Management



Your Duncan Advisor Resources Supervision Team

The most exciting and highly anticipated Enterprise call is here!

Join your DAR Supervision Team (Larry, Dennis, Greg,



Catherine, and Thomas) as they work through some of their findings in 2023 that will help you gain more time back into your practice in 2024.

We will review:

- Regulatory Review
- Best practices with Hard Copy Correspondence and OBA's
- Best practices with Email Correspondence
- Trade Review best practices
- Important Audit findings
- Branch Operational Training and Support

Larry L. Qvistgaard, II

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