

# Weekly Rep Call

1/17/2024



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.

**January 24th- What's new with Asset-Map**

## 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!**  
**Do this first!**

**You can get your Hotel Room Today -Please do this by 2/19/24**

For Golfers, [HERE](#) is the link to Amelia River Golf Club and [HERE](#) is the link to Long Point at Amelia Island.

For you Non-Golfers, the Duncan BGA will be sponsoring a Thursday afternoon with 4 fully-stocked cabanas on the beach

## CJ's Compliance Corner



### Bitcoin ETFs

On Wednesday, January 10, 2024, the SEC approved several bitcoin ETFs for exchange trading.

Prior to effecting any transactions in bitcoin ETFs, financial professionals will need to complete a mandatory Cryptocurrency/Digital Asset training course through RegEd

- You may access this training course by contacting [surveillance@cir2.com](mailto:surveillance@cir2.com) and requesting to be assigned the training course. There could be a 24-48-hour lag between the time of the request and the time the course is actually assigned and made available to you. Financial professionals are not permitted to trade bitcoin ETFs until they complete the training. This applies to transactions at our clearing firms (Pershing & NFS) and custody firms (Schwab, FIWS). Any trades that are completed in advance of the training completion will be subject to being broken, with corresponding losses being the responsibility of the financial professional.

Remember:

- Bitcoin ETFs will be subject to specific concentration limits
- Financial professionals must have a Series 7 license regardless of whether ETF trades occur in an advisory or brokerage account

- Bitcoin ETFs have the potential to be very volatile in terms of price movements and therefore, are only suitable for those clients able to understand the risks and withstand potential losses

For a more complete overview of this news, click [here](#) to view the Cambridge Special Report published last week.

## New Form CRS Requirements

All financial professionals who operate websites will need to update to include a link to Cambridge's Form CRS document(s). Click [here](#) for more details, and for a pre-approved template that you can add to your website footer to meet this requirement.

# Around the Product Block



## Exciting Financial Planning Announcement

Duncan's very own Kristen Hull will be joining Cambridge's inaugural Financial Planning Advisory Council.

For those that are looking to add or enhance their Financial Planning, she leads a great team to help you.

To learn more about this offering, check out their section of our website <https://duncanar.com/securities/video-webinars/financial-planning/>

## Best Practices in the RILA and FIA markets

With changes in the interest rate markets of late, some annuity companies are lowering their cap rates. Some examples:

- 6 year 25% buffer with a cap rate of 200% going to 125%
- 6 year uncapped 20% buffer with a par rate of 115% going down to 105%
- 1 year caps decreasing by 1.5%

I have to thank our friends at CreativeOne for this intel. If you had options in front of your clients and they haven't decided, make sure you're getting the most updated rate sheet.

Also, reach out to me if you want to get connected at CreativeOne to help navigate all the approved Cambridge options.

## Housekeeping for many products on CIR2.com

Cambridge has made it easier to see what is approved on the platform for all Annuities, Non-Trade Alternatives, Liquid Alternatives, and recommended mutual funds for your clients.

**Watch the video to see where each of these items are located.**

## 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



### Ascensus

**Wendy Tibbetts, CISP, CHSP, CIS**  
Regional Sales Director, Major Accounts  
Email [Wendy.Tibbetts@ascensus.com](mailto:Wendy.Tibbetts@ascensus.com)

**Nicole McWilliams, QPA, CPFA, C(k)P**  
Senior Director, Retirement Plans  
Email [Nicole.McWilliams@cir2.com](mailto:Nicole.McWilliams@cir2.com)



## A new team dedicated to growing your retirement plan knowledge

Cambridge is pleased to announce the deployment of the Ascensus Advanced Sales Call Center (ASCC), available now as a resource for all Cambridge financial professionals.

The ASCC allows Cambridge financial professionals to discuss specific client situations, as well as retirement and savings plan business development strategies, with Ascensus' team of ASCC consultants. ASCC experts can help you with a variety of issues pertaining to Traditional and Roth IRA, SEP and SIMPLE IRA plans, Coverdell education savings accounts (ESAs), health savings accounts (HSAs), and employer-sponsored retirement plans, and a lot more.

[Sales Call Feature Sheet](#)

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