

# Weekly Rep Call

1/24/2024



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.

## 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



### Tax Mailing Dates

The Pershing and FCCS/NFS Tax Form Mailing Calendars, which contains mailing dates for tax forms, have been posted on the Cambridge Resource Center. You can access this and other helpful tax resources on [www.cir2.com](http://www.cir2.com) with the following path:

CLIC > Cambridge Resource Center > Tax Information [honeycomb]

### 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



### Ascensus Advanced Sales Call Center

Be on the lookout for an announcement from Cambridge about an upcoming webinar covering the Ascensus Advanced Sales Call Center deployment

## Practice Management



## Asset-Map

**Jack Kerr**

**Sr. Advisor Solutions Manager**

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# A simple planning tool that can give your clients comprehensive results!

Asset-Map is an award-winning financial tech start-up based in Philadelphia, PA. We live by the idea that a simple approach can be a better way for financial advisors to interact with clients.

Our technology helps to visualize a client's complete financial inventory on a single, aesthetically pleasing, page so advisors can help people better see and understand their finances-As a result, make better decisions about their financial future.

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