

# Weekly Rep Call

2/7/2024



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.

February 14th - **TruChoice: Who they are and what they do (Branch Meeting Sponsor)**

## 2024 Annual Branch Meeting

**Cut off Date to book your**

# hotel is February 19th

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!

- Register to attend on our [dedicated website](#)
- Book your hotel room through our [dedicated link](#) - one night deposit required.
- If you need to fly, book your travel into Jacksonville Airport

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.

We have close to 20 sponsors that can't wait to meet you.

## CJ's Compliance Corner



### Precise FP: Cambridge Advertising review

We have received confirmation from Cambridge that templates must be submitted to Advertising review for any Precise FP fact finders, questionnaires or reports that will be used with clients & prospects.

### RegEd Cryptocurrency Training guide

Requested cryptocurrency training, but not sure how to access it? Check out this [step-by-step guide](#) to finding the module in RegEd.

### Credit card payment changes

Cambridge will be making a change to credit card processing soon. Due to Cambridge's requirement to remain PCI compliant, they will not be able to move over credit card information on file with their current vendor to this new service. Any credit card payment requests after the change will require a submission of a new credit card authorization form. If you are impacted by this update, Greg Hicks will be able to assist you with the necessary next steps.

## Around the Product Block



### CAAP Model Portfolio Additions and New Wealthport Forms

Model portfolio additions from Ocean Park, Fidelity, and Principal in WealthPort – CAAP®1, or UMA were added February 1, 2024.

- Principal Growth & Income Multi-Manager portfolio series has been added
- Ocean Park Moderate Allocation portfolio has been added
- Fidelity Target Allocation Tax-Aware Portfolio series has been added

These are material changes, the WealthPort Wrap Client Agreement and Application version dated 091823 will continue to be accepted through March 4, 2024. As of March 5, 2024, the WealthPort Wrap Client Agreement and Application version date 011124 will be required and the older version dated 091823 will no longer be accepted.

### Mastering Financial Clarity: Unveiling The Power of Asset-Map Visuals

Dive into the dynamic world of financial planning with Asset-Map! Join Cambridge for an engaging demonstration where we unveil the power of interactive visuals, transforming complex financial landscapes into clear, strategic roadmaps. Learn how Asset-Map crafts a comprehensive view of your client's financial life, paving the way for informed decisions and proactive planning.

Feb 22, 2024 04:00 PM EST [Register Here](#)

### What's Happening? Social Media Trends To Watch in 2024

Your Cambridge Source experts will unpack the latest trends in analytics, content, and strategy for your LinkedIn, Facebook, Instagram, and more. Gain insight you can use to fuel your brand growth on the most popular social platforms for financial services in 2024.

Feb 28, 2024 04:00 PM EST [Register Here](#)

## Practice Management



### Duncan Walsh Advisors

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**Chief Executive Officer**

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**Chief Investment Officer**

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As a member of a Cambridge Enterprise, you have access to dozens of investment managers for recommendations that fit your clients' needs and goals. Internally, we have a Team-Directed option called Duncan Walsh Advisors. Tune in for a review of the current portfolio strategy, and economic/market metrics DWA monitors for you and your clients.

[DWA Portfolio Sheets](#)  
[DWA Client Brochure](#)  
[About DWA](#)  
[DWA website](#)  
[DWA Request for Proposal](#)  
[Dave's Presentation](#)

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