

Weekly Rep Call

2/14/2024



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.

New Topics coming soon

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



Quarterly Mutual Fund Share Class Conversion

The next conversion cycle will take place beginning February 14, 2024. If you have accounts holding positions that will undergo share class conversions, Cambridge will E/mail the financial professional of record on the account prior to the conversions being initiated. Upon receiving that email, please avoid trading positions (singularly or in models) that are not on the preferred share class list. More details can be found [here](#).

President's Day

In observance of Presidents' Day, banks, all domestic equity and bond markets, the Federal Reserve, as well as FCCS/NFS and Pershing will be closed on Monday, February 19. For deadlines and impacted items, check out the full announcement [here](#).

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.

Annual Letter Mailing

The annual privacy policy notification and other required disclosures facilitated by Cambridge are expected to begin mailing in early March 2024. These are mailed to clients with open accounts prior to December 31, 2023.

Around the Product Block



New Financial Planning Engagement Form

The Financial Planning Engagement Form was updated recently with new language that will enhance what you can do with clients. Details of this will come from Cambridge in the near future.

The new form date is 011924

This change does not affect the Schedule A.

Cambridge Referral Bonus

With love in the air today, nothing would be better than to get a 4% referral bonus from your favorite Valentine - Cambridge.

As a reminder, for any Financial Professional you refer to me and joins Cambridge, you will get 2% of their verified production after they join.

You'll get another 2% of their actual production once they complete 12 full months.

Maximum payout is \$50,000.

Practice Management and Business Opportunity



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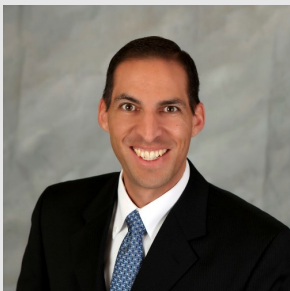
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