Weekly Rep Call

Duncan ADVISOR RESOURCES

Making It All Work Together

2/28/2024

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)

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.

March 6th - Protective (Branch Meeting Highlight Sponsor)

March 13th - No Rep Call

March 20th - Redtail Updates and Enhancements at Cambridge

2024 Annual Branch Meeting

Branch Meeting Agenda

We are excited to host the 2024 Annual Branch Meeting 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.

Transportation

For those who may not be familiar or comfortable using Uber or Lyft, the resort has partnered with East Coast Transportation as the best option for a ride to and from the airport. You may click this link to secure your reservation

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 2 fully-stocked cabanas on the beach.

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

#DARBranch2024

CJ's Compliance Corner

Mutual Fund Policy Update

Effective immediately, for accounts held directly with mutual fund companies only, financial professionals may forward paperwork and funding to the mutual fund company after submitting paperwork in CLIC Trade Review, prior to supervisor/principal approval. The policy outlined in **this announcement** specifically pertains to direct mutual funds. It does not extend to registered 529 Plans, or any other sponsor products. Please continue waiting for CLIC approval to submit paperwork for those other lines of business.

AdView deadline approaching!

Materials submitted through AdView prior to the January 1, 2022 must be resubmitted into RegEd communications review before March 15, 2024 if you wish to continue using them. Following that date, AdView will be decommissioned. Anything not resubmitted at that point will be considered expired and no longer approved for use.

- How do I access CLIC AdView?
  - Adview can be accessed **here**.
- Where can I find additional information on the RegEd Communication Review tool?
  - More information can be found **here**.

Upcoming Tsunami of Start-up Plans Webinar

Between legislative activity at the state level and enhanced tax credits via SECURE 2.0, we are experiencing unprecedented growth in startup retirement plan opportunities. If you serve small business owners as part of your wealth management practice, understanding this “new” startup plan market can help you capitalize on this growth in 2024 and beyond.

Join Nicole McWilliams, Senior Director of Retirement Plans at Cambridge, and Chuck Rolph, Technical Director at Nationwide’s Advanced Consulting Group, as we explore:

• State-facilitated retirement savings programs
• Use of availability employer tax credits to facilitate startup retirement plans
• Single-employer retirement plan alternatives to state-mandated plans
• Opportunities

Mar 5, 2024 04:00 PM EST

Register Here

CLIC Redtail Integration

CLIC® will be enhanced on Wednesday, February 28, to allow financial professionals using the CLIC-Redtail integration to sync client data from CLIC to Redtail. Currently, client records can be imported from Redtail to CLIC, but client data cannot be synced from CLIC to Redtail. After this release, users will select a sync button to easily update client data from CLIC to Redtail.

Review the link below to learn more about this release.

Redtail Updates

GReminders

Cambridge has entered into an agreement with GReminders in which Cambridge financial professionals receive a 10% discount.

GReminders is an automated scheduling and SMS reminder tool built for financial professionals, and the only scheduling app that integrates directly with Redtail and Wealthbox CRMs. GReminders automatically creates new contacts, launches workflows, and maps questions to custom fields in your CRM. It can also help schedule individual, group, or round-robin team meetings.

For questions, or to learn more about GReminders, please contact Tech Consulting (**techconsulting@cir2.com**).

Website and demo can be **seen here**

Business Development Sessions

As part of my role update, I want to help you grow your business. Ways that we can work together:

- Determining if hiring staff is right for you
- Finding that NetGen Advisor
- Understanding a product better
- Getting a new securities license to help you do more business

There are a number of topics beyond this we can discuss. To book time, Click Here to access my calendar.

Business Opportunity

Advisors Capital Management

Joe Richard
Vice President of Sales
Email: joseph.richard@advisorscapital.com

Stephen Curry
Key Account Manager
Email: stephen.curry@advisorscapital.com

As it gets closer to the Branch Meeting, we are highlighting our sponsors.

ACM has been a regular supporter of Duncan Advisor Resources and its Financial Professionals.

Tune in for a small sneak peak on what they will discuss as well as a reminder of how they are here to support your practice.

Presentation

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