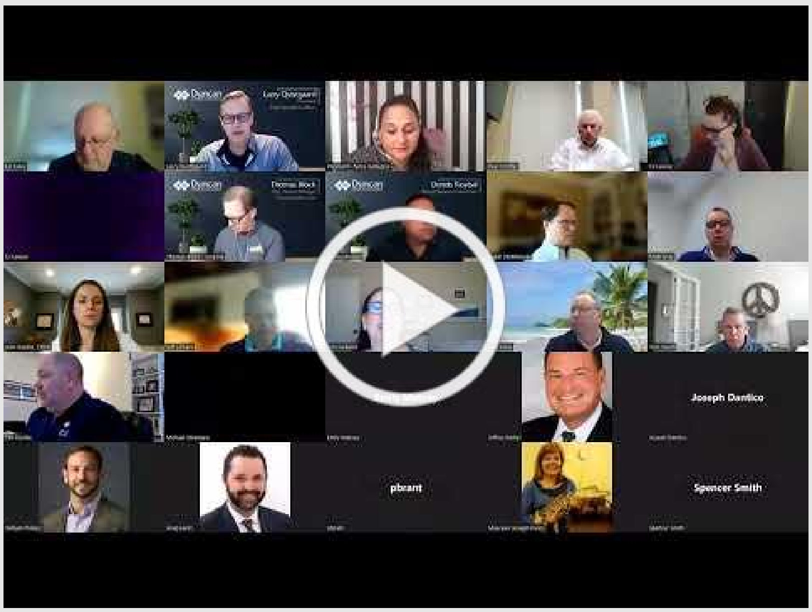
Weekly Rep Call

1/31/2024

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.

February 7th - Duncan Walsh Advisors: Quarter 4 review and Market Outlook

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

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!

- 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

Communication Review Module

Some items that you send or receive by mail are not required to be submitted to Hardcopy Correspondence review. Save yourself some time, and check out the list below to see what you can leave out of your future entries (also found in compliance manual):

What NOT to submit:

- Securities account forms
- Sponsor documents, etc.
- Correspondence from the home office
- Confirmations
- CIRStatements reports without manually entered accounts
- Advertising materials

November 16, 2023

- New or Existing Account paperwork
- Copies of emails
- “Junk mail” or spam faxes
- Trade blotters
- Check blotters or copies of checks
- Non-investment related correspondence (e.g., utility bills, junk mail)
- Tax Returns
- Account Statements

Around the Product Block

Annuity Academy

Cambridge has launched an Annuity Academy that will feature product sponsors, case studies, and CE credit. The first one is February 15th at 2pm. Registration can be **found here**
To see the upcoming schedule and plan your calendar, **click here**

Updates to the Cambridge Approved List

Cambridge rolled out a mutual fund recommendation list early last year. Starting this money, they have added ETF's to the list. Please watch the video to see more about how to find it on Cir2.com

Practice Management

PreciseFP

Nora Gallegos
Financial Planning Thought Leader
Email nora_gallegos@docupace.com

Are you looking to get time back into your practice?

Precise FP is an award-winning client engagement and data-gathering platform designed to facilitate working remotely with clients.

This platform makes manual data entry a thing of the past by automatically sharing client data with your CRM and financial planning tools, as well as prefilling select forms.

Clients and prospects receive personalized engagement templates that are prefilled, making the experience easier and more efficient for them.

FPs using CLIC Advisor would need to discuss enabling the integration with the CLIC Advisor (Advisory Solutions) team as it is disabled because of "single sign on" with CIR

Precise FP Presentation
eMoney/Precise FP Integration Page

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