Weekly Rep Call

3/6/2024

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 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

Fee Billing Non-Billed Accounts Update

The Non-Billed Notification Email will no longer provide a list of the affected accounts that were not able to be billed due to insufficient cash or restrictions on the account. This is an effort to protect Personally Identifiable Information. Financial professionals will continue to receive notifications that trades will need to be placed on accounts, but they will not be specific to impacted clients.

The Non-Billed Report (accessible in CLIC Fee Billing) will contain this information instead. Below are the steps to pull this report:

1. Log into CLIC
2. Under Apps, go to Fee Billing
3. Click on Reports; a new window will open
4. For Report Type: Billing
5. For Report: Non-billed Accounts
6. Enter information regarding your code Billing Type Quarterly or Monthly and date frame
7. Under Chose Parameter select the billing in question
8. Download Report

Prefer visual guides? Watch the recording as I demonstrate how to generate a report using the above steps!

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**.
- How do I export multiple AdView submissions?
  - Check out this **guide**.

Around the Business Block

CRC Designation

The **Certified Retirement Counselor® (CRC®)** program content is unique in that it covers both retirement accumulation and distribution planning, behavioral finance considerations, working with clients based on different communication styles, and other client relationship building topics. The end result is a retirement professional who is better prepared to offer holistic retirement planning "counseling" solutions.

Click here for more information about the CRC® program and the Cambridge 35% Limited Time Discount Offer, available through March 22. See how the CRC® can be a stepping-stone to becoming a CFP®.

Annuity Study Group & Academy Webinars

If you're unable to make our Branch Meeting next week, there are two Cambridge Annuity webinars going on.

The Cambridge Annuity & Life Insurance Study Group is meeting Tuesday March 12th 2pm EST.
Agenda
Zoom Link

This month Cambridge Annuity Academy will be hosting Prudential's: Legacy Planning Strategies in the Current Tax Environment Presentation, which even offers CE credit! This presentation will focus on estate planning after the passage of the Tax Cuts and Jobs Act. Whether clients have significant wealth or are of more modest means, the time to review a legacy plan is today.

Mar 14, 2024 02:00 PM and you can **register here**

Cash & Cash Alternatives Replay

As recently communicated, Cambridge will be adopting a single, FDIC-insured sweep option on new accounts for both Pershing and Fidelity, with the intent to move all existing balances in sweep accounts to the same single sweep product by the end of the second quarter in 2024.

Last week, there was webinar to learn more about regulatory considerations, differentiation between cash waiting to be invested and cash as an asset class, communication with your clients, key resources, and more.

The recording 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

Protective

Jeff Waddington
National Sales Director, Annuities
Email: Jeff.Waddington@protective.com

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

We appreciate Protective as a 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.

Most Important Advisor Service
Income Capabilities
SecurePay

Larry L. Qvistgaard, II
President, COO

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Making It All Work **Together**