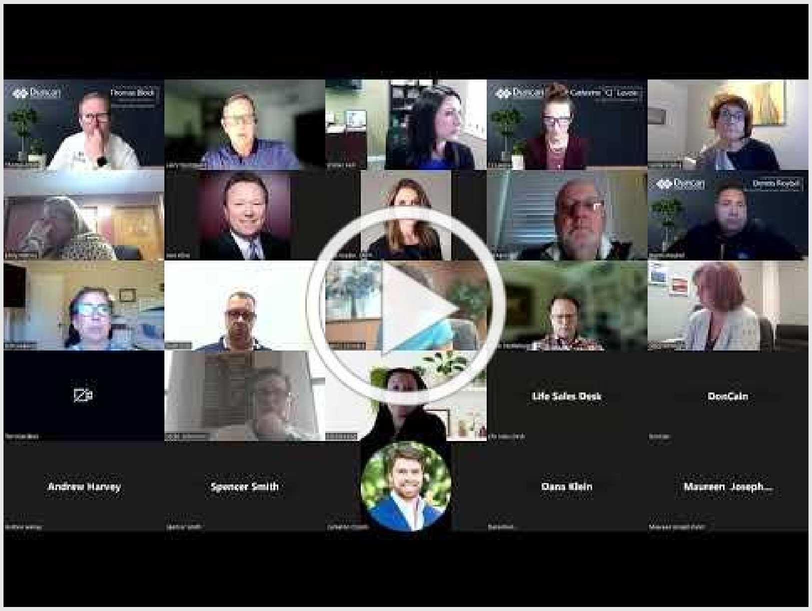
Weekly Rep Call

3/20/2024

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.

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Got an idea for a call? Reach out to Thomas Block

March 27th - Parker Mosley The Pacific Financial Group

April 3rd - Stephanie Reilly SEI Resources

April 10th - Natasha Holland Nationwide Resources

April 24th - Cole Beasley Jackson Resources

2024 Annual Branch Meeting - A Thank You

#DARBranch2024

On behalf of the entire DAR supervision team, we want to thank you for being part of our Annual Branch Meeting.

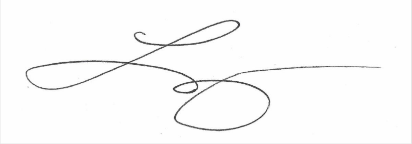
From our Duncan employees, Cambridge partners, and the sponsors, everyone contributed to a fantastic event.

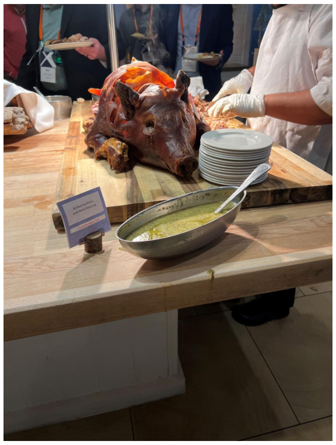
Our great videographer from Magnafoto is working on post production of the video's, which we will house on DuncanAR.com. Once they are there, we will send out a communication so you can relive the experience again or see it all for the first time if you were unable to join us.

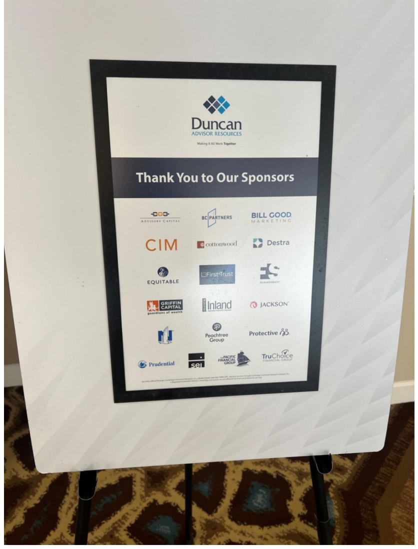
If you missed the posts about the event, be sure to follow our LinkedIn Page.

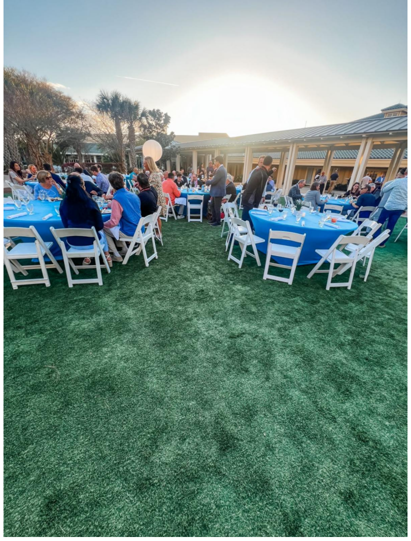
Also, be on the lookout for a survey about the event. This anonymous survey will help us deliver an even better meeting in 2025.

All the best









CJ's Compliance Corner

Important Update Regarding Florida Annuity Requirements

Florida adopted the National Association of Insurance Commission (NAIC) Best Interest Rule with an effective date of January 1, 2024.

As a result, the Florida specific annuity forms are no longer required. Links to these forms will be removed from the Cambridge website and the are no longer being requested during annuity suitability review.

- Annuity Suitability Questionnaire (number: DFS-H1-1980)
- Disclosure and Comparison of Annuity Contracts (number: DFS-H1-1981)

If you have any questions or need further clarification,please contact the Account Supervision team (**operationsaccountsupervision@cir2.com**).

E-mail Encryption Reminder

Cambridge requires all financial professionals to use SmarshEncrypt when communicating non-public information electronically. Non-public information could include, but is not limited to, the first name and last name, or first initial and last name of a person in combination with any one or more of the following:

- Social Security numbers
- Driver's license numbers
- Credit card numbers
- Account numbers
- Account statements
- Last four digits of Social Security number
- Date of Birth
- Passwords

Tips & Tricks - try transferring PII through the vault in CLIC instead!

For more best practices and details, see the Compliance Alert **here**

Around the Business Block

Cyber Breaches & Regulations Webinar

You never think a cyber breach would happen to your firm—until it

does. Cybersecurity poses a unique challenge at the intersection of technology, regulators, and a motivated adversary. A fiduciary mindset is key to managing this misunderstood—and often underestimated—business investment.

They'll cover:

- The real-world impacts of a cyber breach
- SEC regulations and how to prepare
- The ramifications of failing to address cyber risk
- How to think like a cyber fiduciary

Cyber breaches, regulations, and you: What's at stake?
Thursday, March 21, 2024
1:00 PM Eastern Daylight Time
Register Here

How to leverage ChatGPT Webinar

April edition of "Thursdays with Jackson". They will be hosting on the topic of ChatGPT. Specifically, how you can leverage it as a financial advisor.

In the session you will learn:

- What ChatGPT is and why you should consider using it for your business.
- How top financial advisors are using ChatGPT to save time and boost marketing efforts.
- How to make ChatGPT smarter and customize it for your needs.
- Live demo on how to get started with ChatGPT with real advisor examples.

Thursday April 4th at 10:00am EST:

Register here

Business Plan Tune Up

As we approach the second quarter of the year, now is a great time to make sure your office is on track to hit your goals and projections for 2024.

From planning new technology, new hire, creating a digital strategy, etc, this is a great time to see where you are YTD and the next three quarters.

Grab time on my calendar today

Ignite 2024

Are you ready to Reach New Heights? Join Duncan Advisor Resource at the Gateway to the Rockies where you will experience inspiring keynotes, hands-on labs, and 100+ educational sessions – plus plenty of opportunities to reconnect with old friends and network with peers.

Join us to celebrate a fantastic week, Thursday dinner as an enterprise, and the Friday night closing event, Glow on the Rocks party. Wear your brightest neon colors and dance along to the Party Crashers – a live band back by popular demand from our 2019 Ignite.

August 21-23 | Aurora, Colorado | Gaylord Rockies Resort

Registration opening in April

Business Opportunity

Cambridge Product Management

Quenton Dodson
AVP, Product Management
Email: quenton.dodson@cir2.com

In the last year, Redtail announced changes to their CRM platform. With Cambridge's new deal with Redtail now live, you may have lots of questions on what that means to you.

Tune in to hear those updates and the resources to understand how those changes can affect your experience.

Redtail Updates

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