Weekly Rep Call

3/27/2024

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

April 3rd - Stephanie Reilly SEI Resources

April 10th - Natasha Holland Nationwide Resources

April 17th - Mick McClendon CIM Group

April 24th - Cole Beasley Jackson Resources

Upcoming Solo Practitioner and Admin Call

Add to your calendar: April 2nd, 4pm - 5pm Eastern
Please plan to join us for this quarter's call:

What is the topic this time?

Opening the kimono!
a sneak peek behind the scenes of supervisory review
a resource tour: the hidden CIR2.com gems you never knew about
(do you use a little-known tool? sharing your own favorites with the group will be encouraged!)
Referral Bonuses for administrative staff
monthly calls???
....
and more!

To join Zoom meeting:
https://duncangrp.zoom.us/j/86145321204?pwd=U0svYi9EZHQ4ck5BeUhZREVIUmhvQT09

Meeting ID: 861 4532 1204
Passcode: 853330
One tap mobile
+12532050468,,86145321204# US
+12532158782,,86145321204# US (Tacoma)

CJ's Compliance Corner

Admin and Solo Financial Professional Call

Make sure you add our meeting this coming Tuesday to your calendar. Details are above.

Check your Trade Review

It is important on a regular basis, to check Trade Review. From Rights of Accumulation, Reinstatement, Blue Sky, etc Something could come into your queue even if you haven't submitted paperwork for several days.

Best practice if you can't check first thing in the morning every day, at least do it every other day

Around the Business Block

Exciting Update to the Cambridge Referral

Program

For 2024, you've heard me discuss the 4% referral bonus when a Financial Professional you have talked with, comes over to Cambridge.
Announced last week, this has been extended to all Admins. If they are a producing admin, it'll pay through from Cambridge. Non-Producing Admins will have a check cut to them directly from Cambridge.
Let me know how I can help you have the conversation with an interesting Financial Professional.

Contrafirm Awareness Tool

Cambridge announced new functionality updates to its Contrafirm Awareness tool on cir2.com that will go into effect Friday, March 22.

Among the upgrades, Contrafirm Awareness is transitioning from a standard Excel sheet to a document integrated within cir2, offering a more user-friendly experience, enhanced navigation, smoother scrolling, and improved chart-reading features. Enhancements to the tool's search functionality will also make searching for specific business types easier and more fluid. Whether looking into a particular category or conducting a more comprehensive search across all business types, financial professionals can use the search bar at the top of the screen to type their request and generate a list of useful links.
Clicking on a particular link will then redirect users to the corresponding section of the chart, allowing for quick access to valuable information. The new and improved tool will be found on the existing Contrafirm Awareness page, located under News & Events > Education & Events Resources > Orientation Training > Brokerage > Brokerage Transfers > Contrafirm Awareness.

Cheat Code - Type Contrafirm Awarness Tool in the search bar on CIR2.com to get to it faster

NFS/FCCS Retiring Bond Trader Pro

FCCS will be retiring Bond Trader Pro on April 11, 2024 and will be moving all fixed income trading to its new platform Bond Beacon. The migration was completed on March 22nd. Users that currently have access to Bond Trader Pro will not need to do anything to gain access to Bond Beacon and will have access starting on the March 22 after Cambridge's mass user migration.

FCCS has trainings available through the Learning Hub, which can be accessed through the Wealthscape platform by going to the Menu tab, then Resources, Learning Center, and then Learning Hub. FCCS has scheduled live trainings which can be registered for by navigating **here** once you've logged in. In addition to the upcoming live trainings, they also have recorded trainings that can be accessed by going to the **Library** in the Learning Hub, then clicking on Trading, then Bond Beacon under Topics.

A Great Referral Idea

I discussed a referral post from LinkedIn that I thought was fantastic.

To see it, **click here**

Retirement Plan Summit

The retirement industry continues to evolve and so has Cambridge's Retirement Plan Summit, the premier education event for Cambridge financial professionals interested in growing their retirement plan business.

Their expert presenters and panelists will provide insight and fresh ideas on a wide range of topics, including: strategies to help you grow your business, best practices to help the plan sponsor mitigate their risk, and techniques designed to help participants meet the ultimate goal of retirement readiness.

There will also offer networking opportunities with ERISA attorneys and industry professionals for financial professionals focused on retirement plans.

May 20-22 Boise, Idaho
Register Here if interested

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 Ideas

The Pacific Financial Group

Parker Mosely
Sales Relationship Manager, Southeast
Email: parkerm@tpfg.com

We have to thank Parker and TPFG for being a part of our

Annual Branch Meeting.
In this discussion, he will review some of the best conversations he had in Florida, what Financial Professionals are utilizing his firm for, and a review of their capabilities to help you grow your practice.

TPFG Deck
TPFG Territory Map

Larry L. Qvistgaard, II
President, COO
Duncan Advisor Resources
215 Avenida Del Mar, Ste. B, San Clemente, CA 92672
T 800.517.9901 x2230 **C** 949.306.0060 **F** 707.676.8633
www.duncanar.com

Duncan ADVISOR RESOURCES
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