

Weekly Rep Call

4/10/2024



Making It All Work Together

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.

April 17th - **Mick McClendon CIM Group**

April 24th - **Cole Beasley Jackson Resources**

Branch Meeting Survey

Whether you joined us for the Branch Meeting or not, we need your feedback

Please click the link below and take our survey. As we plan for 2025, we need to know what would interest you for activities.

[Take the survey](#)

CJ's Compliance Corner



Admin and Solo Financial Professional Call

Thank you for those of you who joined the call! Due to a technical difficulty, the call recording was corrupted, so I will be creating a video to recreate my presentation of the topics that were covered. Once this is complete, I will be sending out the full meeting notes, which will include copies of the resources shared. I expect this to be done by the end of the week, so be on the lookout!

IAR CE 2024 Requirements

Do you have a physical registration in one of the states listed below? Additional requirements are effective for you this year. Training can be found in RegEd. On the left hand side you should see IAR CE. 6 of the credits will be met by the annual FINRA Regulatory CE, so only 6 more hours will need to be completed in RegEd. Not seeing IAR CE in RegEd? Just contact Amanda Ross at amanda.ross@cir2.com and let her know.

Jurisdictions

- Arkansas (effective in 2023)
- California (pending effectiveness in 2024)
- Colorado (effective in 2024)
- Florida (effective in 2024)
- Hawaii (effective in 2024)
- Kentucky (effective in 2023)
- Maryland (effective in 2022)
- Michigan (effective in 2023)
- Mississippi (effective in 2022)
- Nevada (effective in 2024)
- North Dakota (effective in 2024)
- Oklahoma (effective in 2023)
- Oregon (effective in 2023)
- South Carolina (effective in 2023)
- Tennessee (effective in 2024)
- Vermont (effective in 2022)
- Washington, D.C. (effective in 2023)
- Wisconsin (effective in 2023)

Instagram Policy Updates

Effective immediately, Cambridge policies will require that **comments** on all business-related posts be **turned off**, and comments on other users' posts that could be industry-related be **avoided**.

For instructions on how to change these settings, click [here](#).

Sponsor Company Reimbursements

Sponsor companies are permitted to cover a portion of, or all of, a financial professional's expenses for an education or training event that they are hosting. These types of events may also be referred to

as “due diligence” events. Expenses can include travel, hotel, meals, and the cost of the event. Even if the sponsor company is paying the vendors directly, the financial professional is still responsible for submitting a Sponsor Company Reimbursement Form to disclose the expenses paid on their behalf for attending these events.

For more information about this, and many other items related to sponsor company reimbursements, check out the [dedicated page](#) on CIR2.com!

Around the Business Block



Adding Cambridge Experts to your Website

Members of the Cambridge Due Diligence Team are now approved to be on your websites. If you'd like to add investment research members to your "Team," reach out to me and I'll walk you through this process.

Money Market Fund List

Cambridge recently added money market mutual funds to the preferred share class list for managed accounts for financial professionals as a resource in the plan and propose tool in Wealthport. Associated share classes for the money market mutual funds on the preferred share class list will be handled in the same manner as all other fund options. Preferred share classes of choice can be found by navigating to [cir2.com](#) and following the path below:

- [Investment Choices > Offerings > Mutual Funds > Mutual Fund Share Classes for Managed Accounts](#)

New Personal CFO Services

Available now, Private Client Solutions will help connect financial professionals and their clients who are seeking sophisticated financial management with the expertise of an experienced CFO.

Financial professionals can choose from a customizable menu of à la carte CFO services for their clients, including monthly household bookkeeping services, electronic bill payments, budget preparation and review, and more.

By outsourcing the above tasks to a seasoned CFO, financial professionals of all experience levels will be able to uncover critical insights into a client's financials and create a plan based on current spending, anticipated events, and short- and long-term goals. The personal CFO organizes all the data so the financial professional and client can make informed decisions.

This enhancement is made possible through a partnership with Hero CFO, a subsidiary of Compass CFO Solutions. Hero CFO and Compass CFO Solutions are renowned leaders in outsourced CFO and accounting solutions.

You can learn more by contacting Private Client Solutions (cambridgepcs@cir2.com) at 800-777-6080.

Cash Money

One of our Financial Professionals was cut a check last week for

almost \$11K because of his referral.

Any referral you make and that joins Cambridge, will get you 2% of their verified production and 2% of their actual first year production.

For 10 minutes of your time, a check like this could come your way. Reach out to me if you have a candidate.

Practice Management



Nationwide

Natasha Holland

Senior National Account Manager

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Andrew Karas, ChFC

National Account VP

Email: Andrew.Karas@Nationwide.com



We have to thank Natasha and Nationwide for being a part of our Annual Branch Meeting.

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

Larry L. Qvistgaard, II

President, COO

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