



Making It All Work **Together**

## Quarterly Admin and Solo Practitioner Call

**THANK YOU** FOR JOINING US!  
**SAVE THE DATE FOR NEXT TIME**

Add to your calendar: July 2nd, 4pm - 5pm ET



## TODAY's Q2 CALL AGENDA

### RESOURCES

(links are best viewed after logging into [CIR2.com](https://CIR2.com) first)

Building on Q3's call, additional resources now consolidated for easier and more comprehensive support for your business!

[Resources Word Document](#)  
[OSJ Trade Review Templates](#)  
[Revisions Requiring Client Initial](#)

**Forms**

The Forms section of CIR2.com has more than just a link to the [Forms Wizard](#)  
Stay up to date on changes to forms [here](#) by clicking "Recently Updated Forms"  
Bonus! This page has another helpful list: [forms that require OSJ supervision](#)

### Account Periodic

[Account Periodic Review Guide](#) – Access and functions

[Account Periodic Review](#) – Best Practices Guide and flag definitions

[Account Periodic Review Demo](#) – Video Guide

### FINRA Annual CE (due by December 31st)

[Sign up/Login landing page with instructions for launching your CE course](#)

### RightBridge (now with admin access!!)

Trainings available in Knowledge Center University can be accessed [here](#)  
(trainings can be found by searching "RightBRIDGE"):

- RightBRIDGE Training: Overview
- RightBRIDGE Training: Product Profiler
- RightBRIDGE Training: Investment Wizard
- RightBRIDGE Training: Annuity Wizard

### RegEd Communications Review

[User Guide](#)

[Recorded webinar](#)

### CLIC New! Dashboard

[CLIC New! Dashboard Written Overview](#)

[CLIC New! Blotter User Guide](#)

[CLIC New! FAQs](#)

[Register for a CLIC New! Dashboard training LIVE session](#)



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