Weekly Rep Call

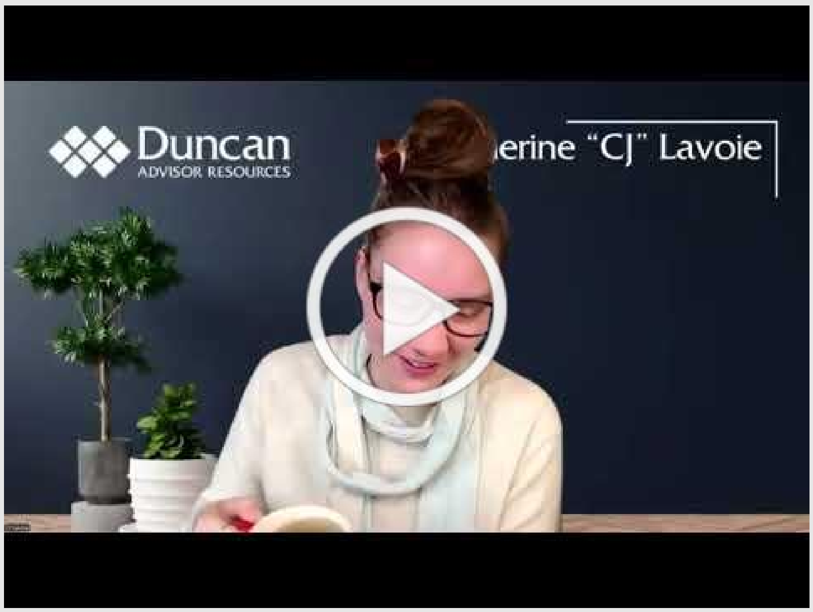
Duncan ADVISOR RESOURCES
Making It All Work Together

6/19/2024

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.

June 26th - Best Practices with Wealthport Advisor Directed with Austin Martin of Cambridge.

July 3rd - NO REP CALL

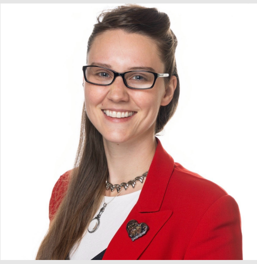
July 10th - DAR Financial Planning - Real Examples and Real Outcomes

July 17th - The New ERA of FMG with Samantha Russell

July 24th - Spotlight on Success with Rickey Thomas

Cooking up more to grow your revenue

CJ's Compliance Corner



Hybrid Locations Survey

Please note – this survey is MANDATORY for all registered individuals regardless of their work location.

The deadline for completion is Thursday, June 20, 2024.

The survey came from a non-cir2.com email address: Cambridgesurvey@qualtrics.com

You can also respond by using the below link: https://cambridgesurvey.co1.qualtrics.com/jfe/form/SV_9zU8swrJR9TMpTw

2024-2025 E&O Coverage

As a reminder, certificates will be sent from an @aonriskservices.com E-mail address. You will receive your certificate for the new policy period via email. These emails should be sent no later than June 21st. If you do not receive your updated E&O Certificate, send an E-mail to **E&O@cir2.com** to request a copy be sent to you.

Cambridge has provided a summary of policy options **here**. Please consult the **E&O section of cir2.com** for additional information. As a reminder, unless previously notified, coverage will renew as expiring, including all optional coverages in which you are currently enrolled.

If you wish to change your coverage, you will need to notify Cambridge via E-mail (**E&O@cir2.com**) no later than June 28, 2024. CAMBRIDGE CANNOT PROCESS CHANGES TO YOUR COVERAGE AFTER JUNE 28, 2024.

Solo Practitioner and Admin Quarterly Call

Please join us July 9th for our next quarterly call! More announcements and agenda details coming soon!

Around the Business Block

A look back - First Quarter of Annuities

On the last Cambridge Annuities and Life Insurance study group, the question of where the new business flows are going came up.

In the link below, you can see where the first quarter annuity flows for Cambridge as a whole and then I added our top carriers as an enterprise.

Top Carriers

More CLIC - Redtail Enhancements

A new enhancement to the CLIC®-Redtail integration will be available the morning of June 19. This new enhancement allows financial professionals with this integration to create existing CLIC clients as contacts within Redtail and allows users to unlink clients from Redtail.

Additionally, a new button will now be available within the Redtail application to provide a new option for importing clients from Redtail to CLIC.

To Learn More, Click Here.

DFA Funds Changes

All Cambridge financial professionals are approved to purchase Dimensional Fund Advisors (DFA) mutual funds. This means that Cambridge financial professionals no longer need to be specifically certified by DFA to purchase their mutual funds.

This approval applies to existing financial professionals and financial professionals that will onboard in the future. Effective with this change, managed accounts in any managed prefix will be allowed to purchase DFA mutual funds.

To learn more about DFA, please visit their website at **Dimensional.com** or **here** on cir2.com.

TruChoice Seminar - TruWomen webinar sponsored by Allianz

The investment risks retirees face today differ from those of the past. In addition to financial risks, retirees also face challenges such as rising healthcare costs, inflation, and taxes.

As a financial professional, you have access tools and resources from Allianz to help address these challenges. Learn more about these strategies and others that you may want to consider implementing into your practice in our upcoming webinar, “Find Your Opportunities.”

Tuesday, June 25, 2024 | 1 PM (CT)
Register Here

Business Opportunities

First Trust

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Eric Cellier
Vice President

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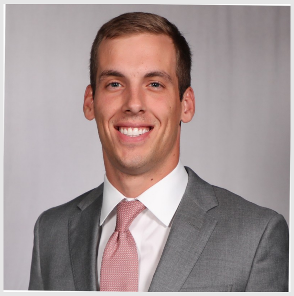
We are really thankful for First Trust's partnership at this year's Branch Meeting.

Brian will review discussions he had down in Amelia Island, areas First Trust focuses on beyond the product, and business solutions approved at Cambridge.



Also, you'll hear from our Financial Professionals on their experience with First Trust

To set up your login, go to this site. After receiving your log in, you will want to click "subscribe" and pick what you want to receive.

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SDVY Product Brief
RDVY Product Brief
Guide to UIT's
Guide to ETF's
FTGS Product Brief
Client Resource Kit
Advisor Consultingg Group
Wholesaler Coverage

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