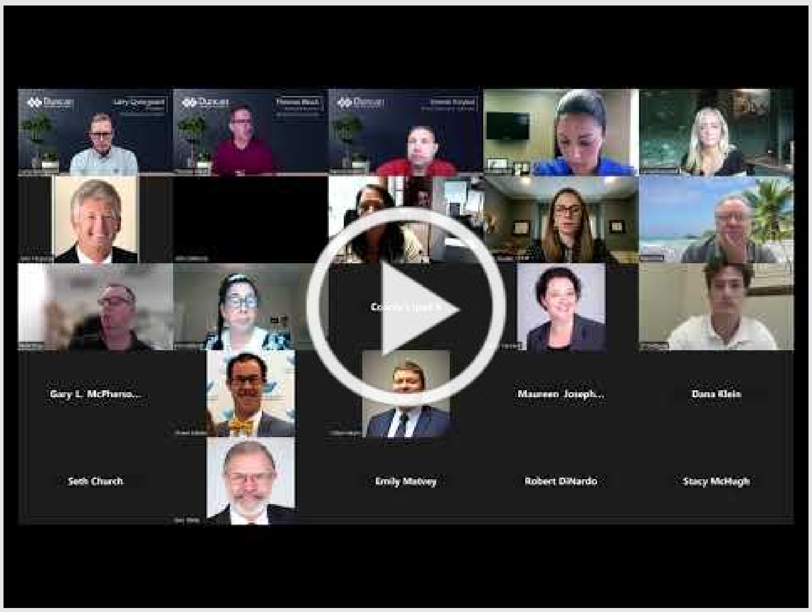
Weekly Rep Call

7/17/2024

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.

July 24th - Spotlight on Success with Rickey Thomas

July 31st - Risk Management and Income with Pacer

August 1st - A Special FS Investment Enterprise Call for Clients 1pm EST

August 7th - DAR Financial Planning - Real Examples and Real Outcomes

August 8th - EncoreEstate Planning: Enhancing your client relationships featuring Kristen Hull 2pm EST

August 21 - Ignite! No Rep Call

Cooking up more to grow your revenue

Larry's Compliance Lounge

Vulnerable Client

Customer Complaints

Customer Reimbursements

For U4 Disclosures

The RegEd tool, found on Cir2.com, should be your go to dashboard to submit any of the above and more.

Tune in to see the walkthrough of the tool.

Around the Business Block

Upcoming CLIC Enhancement

A new enhancement is coming to CLIC® on July 31. This enhancement will separate the Submit button into two separate buttons – an Auto Open Account button and a Generate Trade Key button – allowing more flexibility with the timing of generating an account number and trade key.

To learn more about this enhancement, **please click here**.

Trust & Will for Advisors

Trust & Will for Advisors was recently approved for use at Cambridge!

You now have access to their estate planning solution with a 10% discount exclusively for your clients—enabling you to deliver more comprehensive planning.

Join them for a product walkthrough to see how they partner with 11,000+ financial advisors:

- How your clients can draft state specific estate planning documents
- Tracking and uncovering opportunities for advisors
- Access to advisor dashboard
- Q&A session

Tue, Jul 23rd, 2024 1:00 PM EDT
Register Here

Developing Acquisitions Webinar

Financial professionals need to have a 30-second elevator pitch to explain to retiring peers why their firm is the right buyer. They also need to know how to financially position their firm for lending. This discussion will help future buyers be ready to buy, financially and in their marketing.

Jul 23rd, 2024 04:00 PM EST
Register Here

August Enterprise Calls added

We've added two enterprise focused calls in August. We've added them to the calendar list above. Expect communication save a date's on those very soon!

Marketing and Client Acquisition

FMG

Samantha Russell
Chief Evangelist
Email samantha.russell@fmgsuite.com

Your online presence is how you stay connected with your client and find new ones.

FMG, a Cambridge Technology Business Resource, has gone through some major updates to its platform.

Tune in to hear all about this new ERA!

Presentation
LinkedIn Cheat Sheet

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