Weekly Rep Call

8/7/2024

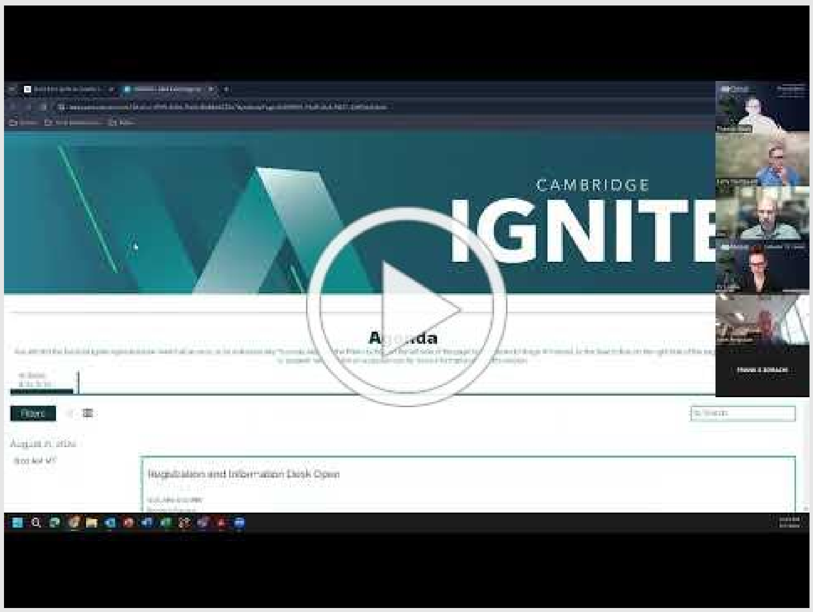
Duncan ADVISOR RESOURCES

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.

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

August 14th - Spotlight on Success: Church Brothers

August 21st - Ignite! No Rep Call

August 28th - Duncan Walsh Advisors

Cooking up more to grow your revenue

CJ's Compliance Corner

Tax BIA Exemptions & QRP Best Practices

Today we covered the list of BIA Form exemptions. Remember, only in very rare circumstances will an exemption apply. Otherwise, the BIA form must be submitted at the time of account paperwork submission. Remember, just one extra minute can save you several days in delays!

The Best Interest Analysis is required for all natural person accounts (for individuals or families). An exemption applies for:

- BIA already completed in RightBRIDGE
- Financial professional change of B/d or RIA affiliation without changing investments, account type, strategy or compensation
- IRIA that is using its own BIA and analysis documentation
- Group-level retirement plan (not owner-only)
- Corporate or entity account
- Financial professional personal securities account
- Financial Planning Engagement or other advice agreement
- Operational reregistration with no recommendation (inherited account, divorce, UTMA/UGMA to individual, etc.)
- Other home office or product company-related change

RightBRIDGE revealed!

Coming next week: a live demonstration of how to document a QRP rollover using the RightBRIDGE tool. We will be joined by two Cambridge representatives, who will be leading us through the process step-by-step, and will be taking your questions! Event details can be found **here**. And if you would like a calendar invite, just send me a request at: **catherine.lavoie@cambridgesecure.com**

Around the Business Block

Navigating AI Tools for your practice

Last Wednesday, an email from Colleen Bell came out announcing approved AI vendors:

- **Zocks: Captures personal and financial details from client conversations without the need for recordings, and integrates with your CRM to automate follow-up tasks, communications, and workflows. Use the link above to schedule your introductory overview with a Zocks representative, and be sure to reference Cambridge to be eligible for discounted pricing.**

- **Jump: An advisor-centric AI tool that takes notes, creates tasks, and updates CRM in meetings**

- **Pulse 360: Streamlines meeting prep, notes, and professional summaries. Integrates with your CRM to automatically start tasks, workflows, and sync notes.**

- **Fireflies: Assists with transcribing, summarizing, searching, and analyzing voice conversations**

Check out each one by clicking their name and schedule a free demo.

A webinar on this topic was held on August 6th. If you did not catch it live, once it is approved by Compliance and posted on CIR2.com, I will post it here.

If you like to see how AI can work, here's the rep call summary produced from zoom

EncorEstate Webinar August 8th 2pm EST

Estate Planning FinTech is here and it's time to get on the train.

Join the leadership of EncorEstate and our very own Kristen Hull, for this educational topic about their technology platform solving a major planning issue - Getting an estate plan completed easily and affordable.

Thursday, August 8th 2024 2:00 PM EDT
Register Here

Planning your Ignite Agenda

The agenda for Ignite is posted. **Check it out here** and reach out to me if you need help navigating the right topics.

New Compensation Tab Live on CLIC Dashboard

New compensation functionality is now live. This enhancement – featuring four new widgets – allows financial professionals using the CLIC Dashboard to view details related to their compensation within in CLIC Dashboard. Financial professional users will see a new Compensation option in their toolbar for selection. To access the four new Compensation widgets, users will select Compensation, then Summary from the populated drop-down.

Spotlight on Success

Duncan Advisor Resources
Financial Planning Department

Brian Duncan, CFP CLU
Chief Executive Officer
Email: bduncan@duncangrp.com

Kristen Hull
Associate Director of Financial Planning
Email: Kristen.Hull@duncangrp.com

We've heard many times that financial planning is an important element to our client's relationship. But what does a financial plan actually look like, and what type of advice is usually discussed?

Please join Brian Duncan and Kristen Hull as they highlight a plan their team recently completed, and the successful outcomes that came as a result of that introductory meeting and subsequent planning conversations.

Rep Call Presentation
Financial Planning Playbook
Financial Planning Duncan Site

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
Making It All Work Together