Weekly Rep Call

8/14/2024

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.

August 21st - Ignite! No Rep Call

August 28th - Duncan Walsh Advisors

September 4th - Duncan BGA: Business idea to increase your insurance sales

September 18th - Spotlight on Success: Bluecap Financial

Cooking up more to grow your revenue

CJ's Compliance Corner

OSJ Team Announcement

Please join us in welcoming the newest member of our OSJ team, Kellie Duffy! Kellie will be assuming the role of trade review supervision, and may expand her responsibilities into other areas as needed. With her extensive background in the financial services industry, we are confident she will be a valuable asset to our organization. To learn more about Kellie and hear from her directly, check out this week's recording via the link above!

Kellie Duffy
Compliance Associate
T 800.517.9901 x3353
Kellie.Duffy@duncanar.com

Presidential Election Political Contributions to Harris/Walz Campaign Subject to the Pay-to-Play Rules

The selection of Minnesota Governor Tim Walz as the Democratic Party candidate for Vice President of the United States means that the political contribution rules for financial professionals are now applicable for any contribution to the Harris/Walz campaign. Effective August 6, 2024, Cambridge financial professionals eligible to vote in the United States presidential election may contribute a maximum of $350 to the Harris/Walz campaign. For more information, see the full compliance alert **here**.

Structured Notes

Effective October 1, 2024, Cambridge will implement new concentration guidelines surrounding the purchase of structured notes. We will cover this in more detail on a future rep call, so be sure to tune in for more at a later date!

Around the Business Block

Navigating AI Tools for your practice

Last week, Cambridge held a webinar on the approved AI tools (listed below).

- **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**

Watch the recording here

Cash Balance 101 Webinar

Do you have any business owner clients who would like to be able to save more for retirement above and beyond their 401(k) limit? How about business owner clients looking for larger tax deductions? If so, a Cash Balance Plan may be the answer. A Cash Balance plan is a type of retirement plan that belongs to the same general class of plans known as "Qualified Plans." These plans "qualify" for tax deferral and creditor protection under ERISA.

Join Carlos Tariche, Cash Balance Sales Director, at FuturePlan to attend Cash Balance 101. During the webinar, they will discuss what Cash Balance plans are, the basics, specific case studies, and how to identify the best candidates.

Thursday, August 28th 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.

Spotlight on Success

A Dynamic Duo
Church Brothers

Seth Church
Wealth Advisor
Email: seth@soundfoundationwa.com

Cameron Church
Wealth Advisor
Email: cameron@soundfoundationwa.com

Many of us with siblings, probably spent a good chunk of our lives trying to get away from the other, but these two are making a career of being together all the time for their clients.

Here are some highlights on their growth:

Revenue - up over 40% on revenue over the prior YTD
AUA - up 30% off AUA over the prior YTD

Tune in to hear more about their successes in their young careers and get ideas you can replicate today.

Church Brothers Interview

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