

Weekly Rep Call

8/28/2024



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.

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

September 11th - Spotlight on Success: Judi Griffin

September 18th - Spotlight on Success: Bluecap Financial

September 25th - Cambridge Custom Reporting within CIRStatements

Cooking up more to grow your revenue

CJ's Compliance Corner



Off-Channel Communications

When a client sends a text message to your personal cell phone, and you transition the conversation to your compliant texting solution, please remember to capture the incoming client message by sending it to your Smarsh monitored E-mail address. You can do this by taking a screenshot, or by copying & pasting the message and typing the client name/date in the subject line.

You must use compliant communication channels with clients as well as with staff and other Cambridge admins and financial professionals. Teams & Slack must be integrated with Smarsh for retention. If you have questions about how to set your systems up for monitoring at Cambridge, reach out to me for additional information!

Device Inventory

Coming soon, Cambridge will be collecting information about all devices that you use to conduct business (laptops, cell phones, tablets, etc.) and this information will be updated annually. Stay tuned for more details as they become available.

Buffered ETFs

There have been discussions at Cambridge about the possibility of changing concentration guidelines for buffered ETFs. Be on the lookout for announcements in the future, as well as training on a rep call when any changes become official.

Around the Business Block



Fee-Billing Updates

Cambridge is making updates to our fee billing options in CLIC® and would like to remind you of the policy regarding removing billing exclusions.

Starting August 27, 2024, financial professionals will no longer have the ability to mark an account as “Do Not Bill”* in CLIC. The field will be viewable in CLIC for financial professionals’ reference and will reflect if an account is marked “Do Not Bill.” To request an account be marked “Do Not Bill” financial professionals will need to open a Case to Accounting Compensation.

Accounts being marked “Do Not Bill” will require a reason that will be reviewed by the home office.

Accounts that have asset exclusions, including cash exclusions, individual assets, or accounts marked as “Do Not Bill” will require

client signature to remove the exclusion or “Do Not Bill”. The Fee Billing Detail and Update Form should be completed and submitted to process the removal of exclusions and “Do Not Bill” instructions. *Please note that “Do Not Bill” only applies to the financial professional management fee and will not stop the program or platform fee associated with the account.

For questions, please contact Accounting Compensation at 641-209-5302.

Ignite Thoughts and Thank You

I really have to thank so many of you for making it out to this year's Ignite.

If you were unable to make it, be on the lookout for future communications about recordings on CIR2.com AND check out the [DAR LinkedIn page](#) for posts.

The biggest news coming out of Ignite, was two of our Financial Professionals being awarded with The Spirit of Cambridge.

The annual Spirit of Cambridge Award is given to three independent financial professionals and two Cambridge associates who are dedicated to serving others while reflecting Cambridge’s core values of integrity, commitment, flexibility, and kindness. This is a meaningful award because honorees are selected by Cambridge home office associates. Recipients who are selected must be affiliated with Cambridge for at least 10 years.

Please Congratulate Larry Qvistgaard and Judi Griffin for being awarded the 2024 Spirit of Cambridge.



Larry Qvistgaard is President and Chief Operating Officer of Duncan Advisor Resources, located in Irwin, Pennsylvania. He has been with Cambridge for 11 years and has more than 30 years of experience in the financial services industry. He holds FINRA Series 7, 24, 63 and 65 licenses along with the California Life and Health Insurance License. He is an active member of the Financial Planning Association (FPA) and the National Association of Insurance and Financial Advisors (NAIFA) in Orange County, California.



Judi Griffin is the CEO of Griffin Financial Services Group, located in Clayton, Missouri. She has been with Cambridge for 13 years and has more than 20 years of experience in the financial services industry. She holds the Chartered Retirement Planning Counselor (CRPC®) and Accredited Asset Management Specialist (AAMS®) designations.

To honor the Spirit of Cambridge winners, Cambridge makes a donation in their honor to a qualified charity of their choice. Griffin selected the St.

To honor the Spirit of Cambridge winners, Cambridge makes a donation in their honor to a qualified charity of their choice. Qvistgaard selected the Dementia Society of America as his charity of choice. Dementia Society of America provides programs that bring education, local resources, and life enrichment to individuals and families impacted by dementia.

Louis Zoo – Camp KangaZoo scholarship program as her charity of choice. The St. Louis Zoo is dedicated to bringing wildlife and people together by offering free admission to the public, allowing everyone the opportunity to experience the wonder of its exhibits.

Business Building Segment



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As a member of this Cambridge Enterprise, you have access to dozens of investment managers for recommendations that fit your clients' needs and goals. Internally, we have a Team-Directed option called Duncan Walsh Advisors. Tune in for a review of the current portfolio strategy, and economic/market metrics DWA monitors for you and your clients

[DWA Portfolio Sheets](#)
[DWA Returns Through 6/30/24](#)
[DWA Client Brochure](#)
[About DWA](#)
[DWA website](#)
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