Weekly Rep Call

7/31/2024

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

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

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

August 21 - Ignite! No Rep Call

Cooking up more to grow your revenue

CJ's Compliance Corner

New Wyoming ESG Disclosure Requirements

On the heels of Missouri's decision last year, Wyoming has now also adopted the ESG Disclosure requirement. For more information, see the **Compliance Alert**, or watch the **Rep Call Recording** from last year, when we discussed the Missouri ESG Disclosure Announcement

Pershing: Paper Subscription Fee Reminder

All clients that are enrolled in eDelivery for all document types except tax documents, as of December 31, 2024, will be charged an additional $10 paper tax document fee in March 2025. Changes are coming to the NetXInvestor Basic/Plus Authorization form to include a section for tax documents.

RILA and Fixed Indexed Annuity Exchanges

We advise a comprehensive evaluation of the product differences before recommending any annuity exchanges to a client, as decisions based solely on cap rates may be insufficient. When preparing your paperwork, be sure to provide detailed rationale for how the new proposed transaction will deliver tangible benefits.

Around the Business Block

New CLIC submission buttons live

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.

More details can be found by clicking here

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
Save The Zoom Link

Spotlight on Success

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Don't have FOMO (Fear of Missing Out) for this weeks DAR rep call.
Tune in to learn Pacer's focus on Risk Management and Income thoughts and how they are the "Trend Setter's" of innovative solutions for your clients.

Pacer Trendpilot Dividend Multiplier
Trendpilot and Structured Outcome Strategies
Trendpilot ETF Strategies
Dividend Multiplier Strategy
Swan buffer ETF

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