Weekly Rep Call

9/4/2024

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.

September 11th - Spotlight on Success: Judi Griffin

September 18th - Spotlight on Success: Bluecap Financial

September 25th - Cambridge Custom Reporting within CIRStatements

October 2nd - Nick White of US Energy: Navigating the Energy Sector for Tax Deductibility Today

October 23rd - Alan Roman of TruChoice: Top Ten Tax Traps

Cooking up more to grow your revenue

CJ's Compliance Corner

E-mail Encryption

Encryption is only automatic when sending and receiving from the same domain. Even E-mails to other financial professionals, your OSJ team, and Cambridge need to be secured if the recipient's @ address differs from yours. Keep subject lines clear of PII, and remember that date of birth + client name is now classified as PII at Cambridge.

Missouri ESG

Due to a recent court ruling blocking the ESG Disclosure requirements, Cambridge has lifted the requirements for residents of Missouri. As of now, Wyoming ESG Disclosure rules still apply.

Around the Business Block

FSI CoveredAdvisor

Cambridge is a long-standing member of the Financial Services Institute (FSI) – and while FSI's mission is to advocate on all our behalf, they are also able to pool their members, and offer insurance benefits to members. FSI CoveredAdvisor is an exclusive benefit for FSI members and offers access to key insurance products and services. The enrollment period for the CoveredAdvisor program is now open through October 31, 2024.

Learn more about the program and how to enroll. Your Special Access Code is 'CIR2'. Tens of thousands of FSI members have taken advantage of the large-group rates and benefits created specifically for independent financial professionals and their staff. Some of the benefits include:

- Access to Medical/Dental/Vision, 401(k), HR, and Payroll Support through a bundled CPEO[1] business solution – Enrollment open year-round
- New! Short-term Disability for financial professionals
- Financial professional Long-term Disability: Up to $35,000 in monthly benefit
- Financial Professional and Spouse Group Term Life/Accidental Death & Dismemberment (AD&D): Up to $2 million ($1 million life and $1 million AD&D), term to age 75
- Staff of Financial Professionals: Long and Short-term Disability plus Term Life/AD&D
- Critical Illness, Accident, and Business Overhead Insurance
- No medical exam. One-question underwriting. Dedicated support from start to finish.

Webinar happening today at 4pm EST. **Click the link to see if you can get the recording.**

Wealthscape Single Sign-on

A new single sign-on (SSO) functionality is now available for WealthscapeSM users on cir2.com. The FCCS Wealthscape links on

both the cir2 tool grid and tool ribbon now utilize SSO functionality. This means users will be able to access the Wealthscape application based on their cir2.com credentials without needing to enter a separate user ID and password.
Please note, users who have not utilized the cir2 Wealthscape sign-on link since August 22 will need to input their Wealthscape user ID, password, and multifactor authentication code during their next sign-in. Going forward, the user will be automatically logged into Wealthscape.

New CAAP Strategies = New Forms

The updated WealthPort Wrap Client Agreement and Application is effective September 3, 2024. The new version date 081424 includes the following:

- Frontier Asset Management Standard and Tax-Managed Model Series has been added (see CA-24-75)
- 3EDGE Income Plus portfolio has been added (see CA-24-73)
- Franklin Templeton ESG model series names have been updated (see CA-24-74)
- Kayne Anderson Small-Mid Cap SMA has been removed (see CA-24-76)

These are material changes. The WealthPort Wrap Client Agreement and Application version dated 041524 will continue to be accepted through October 3, 2024. As of October 4, 2024, the WealthPort Wrap Client Agreement and Application version date 081424 will be required, and the older version dated 041524 will no longer be accepted.

AdvicePay integrated in eMoney

Cambridge and eMoney announced the release of summer updates and enhancements within the CLIC® Advisor and CLIC Advisor Client portal on August 22nd. One of those enhancements, was the ability to integrate AdvicePay into your eMoney dashboard.

To learn more about this and the other enhancement, **click this link.**

Upcoming Cambridge Annuity Academy Webinar (With CE!)

Date & Time
Sep 19, 2024 02:00 PM

Join Brandon Buckingham as he discusses advanced strategies of using annuities in trusts for tax purposes, spousal protection and as a multi generation legacy planning tool.

Click here to register

Insurance Opportunities

DAR Life Brokerage General Agency

Jeff Barker
EVP Life Brokerage Distribution
Jeffrey.Barker@duncanar.com

A comprehensive financial plan, includes the discussion of insurance. As part of being with Duncan Advisor Resources, you have access to an experienced and knowledgeable team that can help you navigate insurance topics easily.

Jeff will be joined by the members of the BGA team including:

- **Jonathan Theys - Underwriting Director**
- **Brennan Bauman - Internal Wholesaler**
- **Ted Beach - Regional Director**
- **Robb Stottlemyer - Director, Life Brokerage Sales**

Agenda
Contact Sheet
Planning for LIAM

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