Weekly Rep Call

9/18/2024

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 25th - Spotlight on Success: Bluecap Financial

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

October 8th - Quarterly Admin and Solo Practitioner Call 4pm EST

October 9th - 3EDGE: Introduction of Services

SPECIAL WEBINAR October 15th 3pm EST - Brandon Buckingham: A Financial Professional Guide to the Changing Tax Environment

[REGISTER HERE]

October 16th - Brian Dobbis of Lord Abbett: Making Sense of the New RMD Requirements

October 23rd - Alan Roman of TruChoice: Top 10 Tax Traps

Cooking up more to grow your revenue

BRANCH MEETING 2025 - March 26-28th Amelia Island

Larry's Compliance Lounge

OBA Filing Reminder

It is important that when you are about to engage in an Outside Business Activity (OBA), that you immediately submit it through the RegEd system. You cannot engage in that OBA until it has been approved.

For more information and FAQ's, please **visit this page**

Business Submission Timing Reminder

With the exception of direct held mutual funds (non 529), all paperwork needs to be held onto until an OSJ/Cambridge Supervisor has approved. You can see into Trade Review OR Paperwork Status Monitor for the latest. If you have questions about how to do this, please reach out to any of the designee's on the team.

For reference, please **bookmark this page**

Around the Business Block

Upcoming Solo & Admin Call

CJ and her world famous call is coming to a zoom near you on October 8th at 4pm EST. Block out the time now and look out for another email with the zoom information.

If you missed that last one on RightBridge, **click the link**.

Cambridge Retirement Academy Webinar

Have you heard of the convergence of workplace and wealth? Recent legislation is driving a renewed focus on workers both with and without workplace retirement savings plans, creating opportunities for both wealth advisors and retirement specialists. For the first time, financial health is ranked as the most important workplace benefit by employees after mental and physical health. This suggests that financial professionals may find employees are more interested in talking about their financial wellness than ever.

Join Jonathan Young from Capital Group as he discusses why retirement plans are good for wealth business (and vice versa), when you should get started, legislative tailwinds, and an advisor success story. :

Sept 24, 2024 04:00 PM EST
Register Here

Upcoming discussions on Annuity submission and Trade Review

Next week, I'll be engaging product development teams for both of these topics. Feedback I have gotten from you, our Financial Professionals, has led to a desire by Cambridge to engage on what the biggest issues are and time line for improvement.

As I get updates about either, I'll share them with you on future rep calls.

Practice Management

Sommer Lyons

Performance Reporting Extraordinaire
Cambridge

CIRstatements, powered by Pershing X (formally Albridge) is Cambridge's branded performance reporting tool. Did you know there are some cool reporting functions that could really impress clients? Maybe impress yourself!

Join in on the call as one of the master's of CIRstatements joins us for a discussion on custom reporting. Bring your questions!

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