Weekly Rep Call

10/30/2024

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)

A Review of this meeting created by AI

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

Your OSJ Team

If you need to know who to call, we have a updated call sheet of your OSJ Team.
Please make sure all admins have a copy of this.

DAR OSJ Contact List

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.

November 6th - BlackRock and the Election

November 20th - Annual Business Planning Session for 2025

Cooking up more to grow your revenue

Cooking up more to grow your revenue

DAR Innovate 2025 - March 26-28th Amelia Island

CJ's Compliance Corner

Reminders on the ACM, ACQ, AML, FINRA CE & OBA

Cambridge as the Broker-Dealer, has set October 31st as the deadline to complete all of your annual requirements.

ACM, ACQ, and AML all reside in RegEd

FINRA CE resides in your **FinPro login**

Although it must be done before year end, you don't want to be in a position of being CE inactive and having commissions held in suspense until you are active. Please take the time in the upcoming weekends, to complete these required tasks.

Annuity Disclosure Update

A New annuity disclosure was released October 7, 2024. Please submit any previous versions that may still be awaiting client signature by November 7, 2024. For a full preview of what has changed, take a look at this week's recording.

CLIC Enhancement - WebCapture Bypass

Cambridge is releasing a planned rollout of a new functionality in CLIC® that eliminates the need to utilize WebCapture when using eSignature. This enhancement will automatically send eSignature envelopes to Cambridge — after completion of all signatures. This includes all new account and maintenance paperwork for Fidelity/NFS, Pershing, and direct business. You will have access to this enhancement beginning on **November 20th**

You are invited to sign up for a training session to learn more. All training sessions will contain the same content but are being held at various dates and times to accommodate your schedule. You can also review page 29 of the **eSignature User Guide** for additional information.

- Tuesday, October 29 | 2:00 p.m. CT | **Register**
- Thursday, October 31 | 8:00 a.m. CT | **Register**
- Tuesday, November 5 | 8:00 a.m. CT | **Register**
- Thursday, November 7 | 2:00 p.m. CT | **Register**
- Tuesday, November 12 | 3:00 p.m. CT | **Register**
- Thursday, November 14 | 8:00 a.m. CT | **Register**
- Tuesday, November 19 | 8:00 a.m. CT | **Register**
- Thursday, November 21 | 8:00 a.m. CT | **Register**

Note, WebCapture will still need to be utilized for the following scenarios: Supporting documentation that does not require signature if it was not submitted with the eSignature packet; paperwork that requires physical signature; and document(s) signed electronically outside of CLIC (i.e. WealthPort® Fidelity or WealthPort Schwab accounts).

Around the Business Block

From IDCs to QOZs: Navigating the World of Direct Energy Investments

Updates in the Energy Markets and Tax Planning Strategies for high-net-worth Clients. How does the current macro-economic environment impact energy pricing, development, and investing opportunities for 2024 and beyond?

While clients continue to combat increasing taxes, inflation, and interest rates, how can advisors effectively utilize oil & gas tax strategies (IDCs & QOZs) to assist in case planning for high-net-worth clients.

October 31st, 2024 | 4:00 pm EST | Register here

Simplified Marketing Workflows: How To Leverage Snappy Kraken

Join our partner Snappy Kraken on November 7th at 1 pm ET, where Kendal Wilde, will demonstrate how to automate your entire marketing program in just 30 to 60 minutes.

Discover how to set up months of promotional campaigns, streamline your workflow, and win new clients even during the busy holiday season. Don't miss out

November 4th, 2024 | 1:00 pm EST | Register here

Practice Management Insights

Want to get better at CLIC eSignature?
Convert more commission accounts to advisory?
Hire a virtual admin?

These and other topics are what our Financial Professionals are talking with me during our practice management call. Want to review your 2025 plan? Tell me your pain points by getting on my schedule today.

The Best 30 Minutes for your Business

Business Opportunity

Neuberger Berman

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As the 4th Quarter is in full swing, this is a great opportunity during your client service meetings, to help your clients plan for the unexpected.

Tune in as Max reviews Neuberger Berman's Family Love Letter presentation and how they can help you:

- **Create and Estate Playbook**
- **Roadmap for Next Generation**
- **Reinforce their Financial Plan**

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Presentation

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