

# Weekly Rep Call

11/6/2024



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)



## [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 13th - **DWA 3rd Quarter Review**

November 20th - **Annual Business Planning Session for 2025**

**Cooking up more to grow your revenue**

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**DAR Innovate 2025 - March 26-28th Amelia Island**

## Q's Compliance Corner



### Off-channel Communications Reporting

On October 29, 2024, Cambridge announced the implementation of an **Electronic Communications Training** for all newly associated persons who join on or after November 1, 2024. One important item included in that training was the implementation of a centralized reporting address so that supervisors and financial professionals can report instances of off-channel communication when they occur. This policy will be effective for instances of off-channel communications that occur beginning November 1, 2024.

Going forward, whenever an instance of off-channel communication occurs, the off-channel communication should be forwarded to the email address [offchannel@cir2.com](mailto:offchannel@cir2.com). Forwarding the off-channel communication will both notify the firm of the off-channel communication, and will ensure it is retained within a compliant communications channel at the cir2.com domain.

For more details about this policy change, please [review the Compliance Alert](#)

## Around the Business Block



### Cyber Secure Webinar Series Recordings

In case you miss three-part webinar series *Cyber Secure: Protecting Your Business During the Digital Age* led by Nick Graham, Executive Vice President and Chief Technology Officer, and Josh Goudy, Assistant Vice President of Information Technology, all three sessions are now available via on-demand recordings on cir2.com at the link below.

[Cyber Secure Webinar Series](#)

### Succession or Acquisition Webinar

Continuity and succession planning are critical components of building a resilient business. Equally important is the strategy of acquiring books of business to drive growth. At Cambridge, the Succession and Acquisition Solutions Team is dedicated to supporting you through each of these areas.

Whether you're planning for the future of your business, seeking

opportunities to acquire new clients, or looking to establish a smooth succession plan, their team can guide you every step of the way.

November 19th, 2024 | 4:00 pm EST | [Register here](#)

## Cambridge Council Openings

Both the Cambridge Community of Women Advisory Council and New Century Council are open for nominations.

Applications must be submitted by November 27th and 18th respectively.

Please reach out to me if you're interested.

## Election Review



### BlackRock

**Mark Peterson**  
Director, Market & Portfolio Insights

**Christian Mannon**  
Associate, Model Portfolio Specialist

The 2024 Presidential Election has happened. What do we know? Is there a winner? What about Congress?



Answers to these questions are going to cultivate tax and economic policy which will have an effect on your client's investing strategy.

Also, BlackRock has an incredible Advisor Site which includes the Student of the Market Election Special Edition and a Tax Evaluator Tool.

[Mark Peterson Bio](#)  
[BlackRock Tax Evaluator](#)  
[Student of The Market - Today's Presentation](#)  
[BlackRock Review of Trump Victory](#)

### Larry L. Qvistgaard, II

President, COO

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