Weekly Rep Call

11/13/2024

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

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 20th - Annual Business Planning Session for 2025

Cooking up more to grow your revenue

REGISTER TODAY

DAR Innovate 2025 - March 26-28th Amelia Island

CJ's Compliance Corner

Trusted Contact

A new enhancement is coming to CLIC® on November 13, where users will be able to select existing trusted contact information via a new drop-down menu when creating a new account. Through this enhancement, users can also apply changes made to a trusted contact to all existing accounts for a given client. The required fields for trusted contacts are also being updated. Users will only need to provide first name, last name, phone number, and relationship.

BIA form: Reason for Movement

When selecting "I wish to move from my current account situation" as the reason for movement on the Best Interest Analysis Form, please use the notes section or Other with a description containing more information regarding the client's unique desire to move.

Around the Business Block

Exciting CIRStatements Update

After over a year, a project that I have been working with Cambridge on has finally come to fruition.

As of this week, CIRStatements now feeds all annuity contracts from Athene. With this feed from DTCC now established, this will have a domino affect for more companies to start feeding.

Updates to the newest companies will be announced on this rep call.

CLIC Advisor Client Portal Webinar

Join Heather Becklund, Director of Clients Solutions and Chris Mauriello, Sr Financial Planning Practice Management Consultant with E-money, as they dive into the importance of utilizing the Client Portal within CLIC Advisor.

During this 1 hour webinar they will discuss how this system will help unlock client success and totally immerse them into the process. They will also go over what your clients can expect in the system, how to best utilize it, and provide you with a fool proof process to ensure client engagement within the portal.

November 26th, 2024 | 2:00 pm EST | Register here

Roadmap to Revenue with ME!

Schedule a consultation with me so I can help you curate your goals for 2025.

Ideas we could discuss in your 2025 plan could be:

- Technology review – integrations and cost
- Digital brand cohesiveness
- Social media platform engagement
- Tools to save time and improve client reviews
- Office culture and communication
- Building more Advisory

If you're ready to put pen to paper, let's get time together before the end of the year.

Book Time with Me

Business Opportunities

Duncan Walsh Advisors

David Duncan, CFP
Chief Executive Officer
Email david.duncan@cambridgesecure.com

Thomas J. Walsh, CFA
Chief Investment Officer
Email TJWalsh@WalshAssetMgt.com

As a member of this Cambridge Enterprise, you have access to dozens of investment managers for recommendations that fit your clients' needs and goals. Internally, we have a Team-Directed option called Duncan Walsh Advisors. Tune in for a review of the current portfolio strategy, and economic/market metrics DWA monitors for you and your clients

DWA Portfolio Sheets
DWA Returns Through 9/30/24
DWA Client Brochure
About DWA
DWA website
DWA Request for Proposal

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Making It All Work **Together**