

Weekly Rep Call

11/20/2024



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)



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 27th - No Rep Call.

3 Rep Calls in December with topics announced shortly

Cooking up more to grow your revenue

REGISTER TODAY

DAR Innovate 2025 - March 26-28th Amelia Island

CJ's Compliance Corner



Beneficial Ownership Information Requirement

FinCEN mandates that, beginning January 1, 2025, all U.S. "reporting companies" disclose their beneficial ownership to FinCEN. As a reminder, Cambridge cannot provide you with legal advice; for questions about this matter and how it may apply to your business, please consult with your legal counsel or other appropriate professionals. While your legal counsel can assist you with any questions, generally, financial professionals who conduct their business through a corporate entity, such as a corporation or a limited liability company ("LLC"), may be deemed "reporting companies" and thus may need to make this filing with FinCEN. It is crucial for financial professionals to consult their legal counsel to determine their filing obligations. We are aware that some third-parties are contacting financial professionals offering to assist in complying with this FinCEN mandate. FinCEN reports that not all these third-party service providers are legitimate, and some bad actors are exploiting this regulatory update to commit phishing scams. If you choose to use a service provider to assist in this regard, please be sure you are familiar with your obligation to conduct due diligence on any such vendor. FinCEN may also contact companies required to make this filing. For additional resources, please visit <https://fincen.gov/boi>.

Around the Business Block



CAAP Updates

Morningstar Dividend and Morningstar International Equity Separately Managed Account (SMA) strategies and Ocean Park Growth Allocation Strategy and Ocean Park Moderate Growth Allocation Strategy have been added to WealthPort CAAP/UMA

Cambridge has updated the WealthPort Wrap Client Agreement and Application, effective November 15, 2024.

The WealthPort Wrap Client Agreement and Application version dated 081424 will continue to be accepted through December 15. As of

December 16, the WealthPort Wrap Client Agreement and Application version date 111524 will be required and the older version dated 081424 will no longer be accepted.

CLIC Dashboard upgrades

A new at-a-glance widget is coming to CLIC® Dashboard on November 20. The widget, titled Pending Net Compensation by Product Group, offers a streamlined overview of upcoming payment amounts by categorizing them into three sections: Fees, Trails, and Commission. This provides an opportunity for a more comprehensive understanding of the different product structures related to the payments being received.

To access this new widget, **select Compensation, then Summary within the Dashboard.**

Also launching on November 20 are new data points coming to the Pending Grid view. The Product Group, Product Subgroup, and Compensation Type data points provide enhanced visibility into your pending compensation and will enable you to group by payee net payout amounts with breakdowns through customized search, filtering, and sort options.

Filter by Product Group/Subgroup to better understand how you receive trails, commission, and fees that contribute to your pending net compensation. Filter by Compensation Type to see how adjustments, fees, commission, and trails contribute to your pending compensation. To access, **select Compensation, then Pending within the Dashboard.**

Texting Solutions Upgrades on Broadcast Messages

Hearsay users will be able to send out Broadcast Messages to as many as 40 recipients at once. Previously, broadcast messages were limited to a maximum of 24 recipients.

MyRepChat users are now able to create distribution lists of up to 100 recipients per list. Previously, distribution lists were limited to a maximum of 24 recipients.

Messages sent to the distribution list will go out to all contacts on the distribution list as a one-to-one message, not as a group message. Please be sure verbiage is approved through Communication Review before sending a message to any distribution lists.

Reminder - Free Retirement Expert Support from Ascensus

As the year ends, we would like to remind you about the Ascensus Advanced Sales Call Center (ASCC). This free service is staffed by accredited professionals who support general inquiries on Required Minimum Distribution (RMD) calculations, including beneficiary calculations.

ASCC is available Monday -Friday, 8:00 a.m. – 5:00 p.m. CT by calling **800-417-3126**. You will need to provide the associate answering with an organization number specific to Cambridge, which is 111010.

Business Planning



Duncan Advisor Resources

Larry Qvistgaard, II
President, COO

Email larry.qvistgaard@duncanar.com

Thank you for listening to today's call. If you weren't able to listen live, watch the recording above first and then look at the questions below.

Paint A Picture

1) What do you do for a living? Need help, go to ChatGPT and ask the following question: I'm a financial advisor. Please explain my profession to a non-financial person in the words of a 5th grader. Or please provide me with other titles for my profession that a non-finance person would understand. Remember, not every CPA does taxes and an ER Doctor is different than an Anesthesiologist.

2) What is your ideal client? "You" breaks the ice but follow that up with the objective that they might know someone who could use my help/guidance.

3) What is your account minimum? \$250,0000 might be the answer but open it up allowing for referrals they might have for you. Your clients may not know how much a friend has in savings, but they have heard they need help with their money.

[Why Create a Business Plan](#)
[Guidelines to Creating a Business Plan](#)
[Business Plan Example](#)
[Client Segmentation](#)
[Defining Your Market](#)
[SWOT Analysis](#)
[GOST Strategic Planning](#)

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