

# Weekly Connection Call

12/18/2024



Making It All Work Together

## Today's Connection Call

Click the button below to view the recording of today's rep call.

Call Notes (Click on the **red** links to learn more)

**[Connection Call AI Notes](#)**



**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**

## Connecting You Every Week

We are excited to share that our weekly call is being renamed to "Connection." This new name better reflects the purpose and value of our time together. It's more than just a meeting; it's a dedicated time for sharing ideas, aligning on goals, and fostering collaboration. "Connection" emphasizes the relationships we build, the mutual support

we provide, and the collective progress we achieve as an enterprise. By redefining the name, we hope to capture the true essence of what these gatherings mean for all of us.

## **UPDATED DAR OSJ Contact List**

### **Innovate 2025**

Take the Connection one step further, and let's do it in person.

Innovate is the next step in making our annual meeting even more effective and educational for you, our Financial Professionals.

Join us in beautiful Amelia Island to visit, learn, laugh, and engage that will help you build, enhance, and develop your business.

## **REGISTER TODAY BY CLICKING BELOW**

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

### **Upcoming Connection Calendar**

Rep calls are happening every Wednesday (Except the week of the Annual Branch Meeting) and we are working hard to fill the schedule.

**No more calls for 2024**

**Come back January 8th 11am EST**

**We will begin 2025 on Microsoft Teams. Be on the  
lookout for that announcement**

**Have a great Holiday Season and Happy New Year!  
Thank you for a great 2024**

### **CJ's Compliance Corner**



#### **End of Year Housekeeping**

Best Effort Processing of In Good Order (IGO) paperwork begins on Monday, December 16 for Cashiering, New Accounts and Transfers paperwork

## FCCS/NFS Deadlines for EFTs

- December 18 Last day to establish standing EFT
- December 30 Last day to initiate EFT distributions for the 2024 tax year

## Gifting deadlines

- December 3 Best efforts processing begins for gifting mutual funds
- December 9 Best efforts processing begins for gifting DRS
- December 27 Gifting of equities are due by the end of business

Annual fees:

[Pershing Inactivity Fee](#)

[Pershing Alternative Investment Fee](#)

[Pershing Paper Fee](#)

[Year-end reminders for brokerage accounts](#)

[Year-end distribution and gifting deadlines](#)

## Around the Business Block



### EncorEstate Pricing Update

In order to help Encore continue enhancing our support and software, we'll be raising the prices of our Trust and Will based Estate Plans. This is the first time we've raised our prices and we're excited to be able to reinvest all profits into our product and support team.

Effective January 6, 2025, the price of our Trust Plan will increase from \$550 to \$625, and our Will Plan will increase from \$350 to \$375.

If you want to lock in our current pricing for your 2025 plans, you can purchase plan packages before the new rates take effect.

If you need assistance in getting connected with them, please reach out to me.

### NEW 3rd Party Technology Vendor Page

Have you ever wondered what technology has been approved? What about asking Cambridge to review a piece of technology?

Cambridge has released a dedicated page on both of those items. Located on CIR2.com under business resources and then Compliance Resources (Third-Party Vendor Information Security Review)

OR just click here -> [3rd Party Vendor Page](#)

### 2025 Practice Management Meetings

Are you ready to "Get Ugly in 2025?"

Let's schedule a session in January to talk about what you want to solve in 2025:

- Moving commission accounts to advisory
- Do more insurance business

- Hire staff
- Get a marketing program running

These are just a small amount of the topics we could discuss. To get on my practice management calendar, click this link -> [Thomas Block Calendar](#)

## Recruiting Bonus Reminder

Make a referral of another Financial Professional to me before Dec 31st 2024, to lock in the 4% bonus.

2% on their verified production once they join Cambridge  
2% on their actual production after their first 12 months

## Marketing Idea



### Bill Good Marketing

**Stephanie Peterson**  
**Head of Growth**

Email [stephaniep@billgoodmarketing.com](mailto:stephaniep@billgoodmarketing.com)

In keeping up with our recent theme, we are closing out 2024 with our friends at BGM. Stephanie will be reviewing their website and integrated marketing platform available to Cambridge Financial Professionals.

### Service and Pricing

### Larry L. Qvistgaard, II

President, COO

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