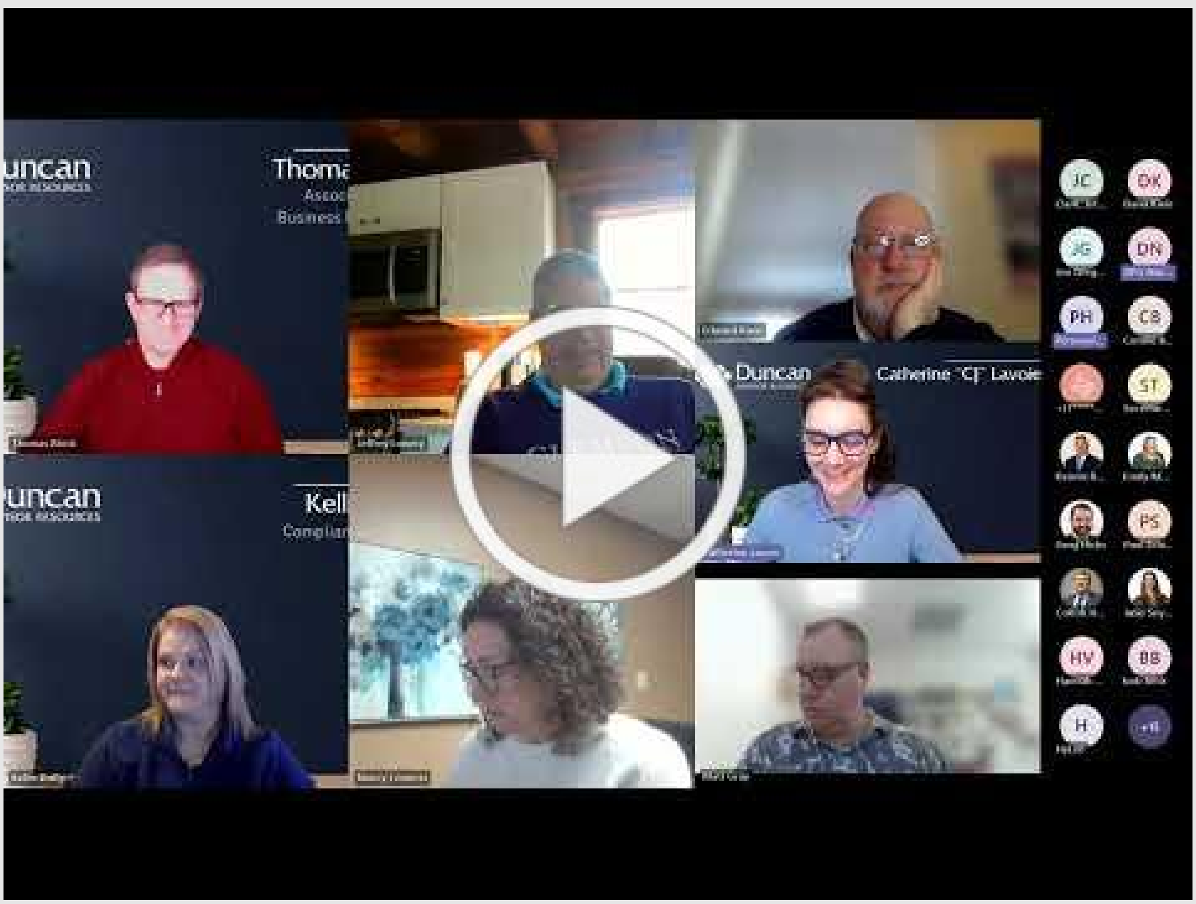
Weekly Connections Call

Duncan
ADVISOR RESOURCES

Making It All Work **Together**

Today's Connection Call

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



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 With You

I have an issue with compensation!

Is this product approved?
Is this an OBA?

When it comes to support, our OSJ enterprise is second to none. But who do you contact? Click the link below and save to your favorites the OSJ contact list. It is the most comprehensive page on who to contact depending on need.

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.

February 12th - DWA 4th Quarter Review

February 19th - Equitable

February 26th - The Pacific Financial Group

March 5th - Protective

March 12th - T. Rowe Price

March 19th - Lord Abbett

March 26th - No call because of Innovate

April 2nd - SEI

April 16th - Ategenos Capital

April 23rd - Inland

CJ's Compliance Corner

Communications Review Expiration Notices

With the implementation of the Communications Review module in RegEd in 2023, Cambridge previously announced that advertising submissions would be assigned an expiration date. These expiration dates are visible in the approved submissions detail screen and on the My Items tab Expiration Date column. Users can request an expiration extension in the submission which will seek to extend the approval for one year. See the **Compliance Alert** For screenshots to help you navigate the process.

Annual Letter Mailing Reminder

The annual privacy policy notification and other required disclosures facilitated by Cambridge are expected to begin mailing in late March 2025. These are mailed to clients with open accounts prior to December 31, 2024. For additional details, access the full announcement **here**.

FCCS/NFS: Wealthscape and Wealthscape Investor Mobile App Enhancement

Fidelity is pleased to announce several enhancements to the WealthscapeSM and Wealthscape InvestorSM mobile apps that will be available starting on January 31, 2025. In an effort to reduce paper, users will have the option to enroll in electronic delivery (eDelivery) on the Wealthscape Investor mobile app.In addition, beneficiary name(s) will be available in the Wealthscape mobile app on the account level Summary screen and in the Wealthscape Investor app in Account Snapshot. Users can tap on a beneficiary's name to view additional beneficiary details such as beneficiary type, relationship, date of birth, and % of share.

For questions, please contact the Tech Access Team (techaccess@cir2.com) at 800-777-6080

Around the Business Block

EncorEstate Plans Webinar

In this case study with Duncan Financial Group, EncorEstate sat down with Kristen Hull (Associate Director of Financial Planning) and Thomas Block (Associate Director of Business Development) to discuss their firm's long-standing challenges with client estate planning

procrastination, and how estate planning became a core pillar of Duncan's offerings.

Check out the blog post and watch the video by clicking here.

Understanding 1031 Exchanges

In recent years, 1031 exchanges have become increasingly popular among real estate investors looking to defer capital gains taxes when selling properties. These tax-deferred investment solutions have rapidly gained traction in the wealth management sector. Financial professionals can attract more high-net-worth clients, increase their practice's revenue, and help manage the proceeds from real estate sales more effectively.

Bluerock's CE Credit Webinar on Understanding 1031 Exchanges is an introductory overview to this space.

February13th 4pm EST **Register Here**

Sneak Peak at the new CIRStatements

You have to watch the video for the sneak peek to see what the new CIRStatements will look like.

Expected release is now March 10th.

Innovate Sponsor Series

Jackson

Jeffrey R. Clark, LUTCF, ACS, FLMI, CFS
Director, Advanced Planning
jeffrey.clark@jackson.com

As we begin the "Road To Innovate," we are very excited to have Jackson on this call.

Jackson has been a consist sponsor of our enterprise meetings for years and we appreciate their support.

Tune in for some great Advanced Planning tips and reminders of the resources Jackson has available to you.

RILA for Retirement Income
Tax Mythology
Trust Tax Deferral

Larry L. Qvistgaard, II
President, COO
Duncan Advisor Resources
215 Avenida Del Mar, Ste. B, San Clemente, CA 92672
T 800.517.9901 x2230 **C** 949.306.0060 **F** 707.676.8633
www.duncanar.com

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