

Weekly Connections Call



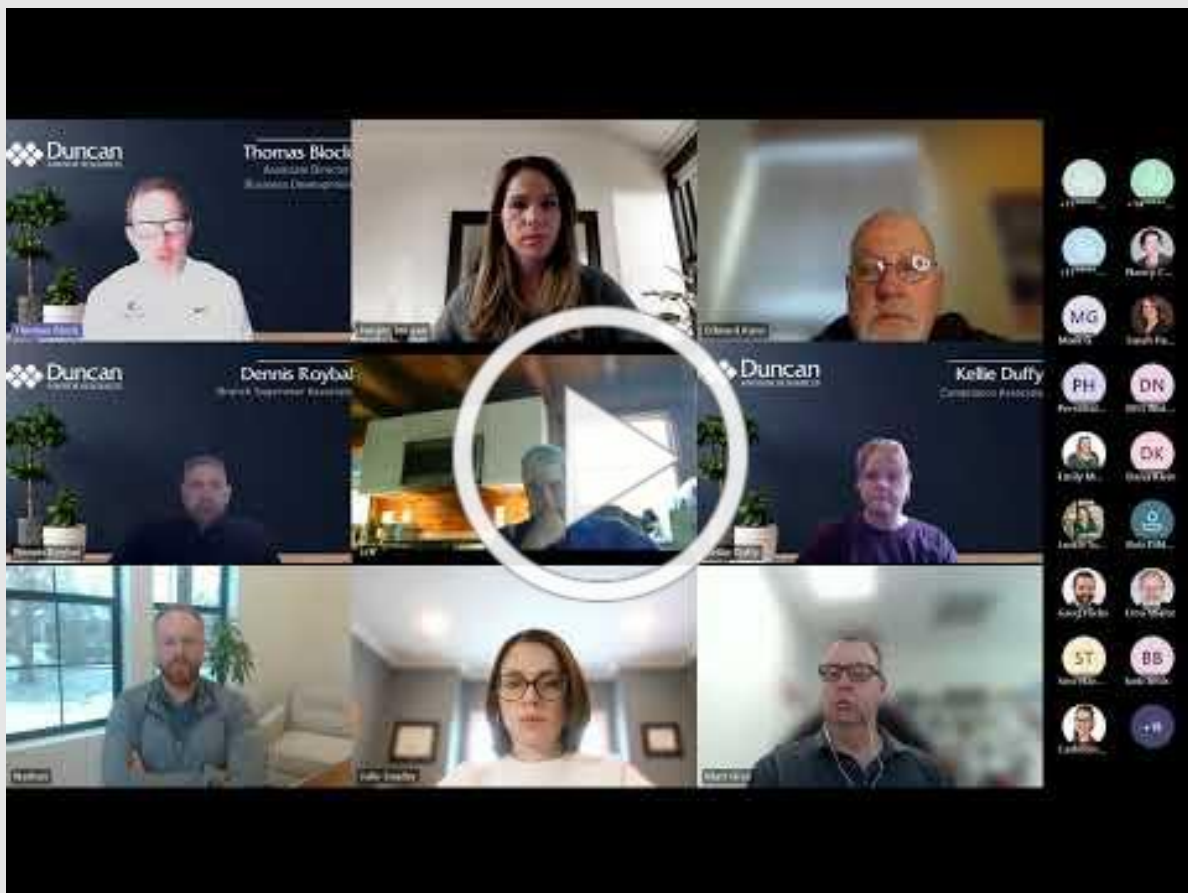
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ADVISOR RESOURCES

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

REGISTER TODAY BEFORE THE FEBRUARY 24th DEADLINE

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 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 9th - FS Investments

April 16th - **Ategenos Capital**

April 23rd - **Inland**

May 7th - **Principal**

CJ's Compliance Corner



BIA & RightBRIDGE best practices

Today we discussed the recent compliance alert, which covers several best practices when completing a Best Interest Analysis form or RightBRIDGE product profiler. Watch the recording for an in-depth look at these important pointers!

Around the Business Block



Important CIRStatements Updates and Trainings

Another reminder that Cambridge has officially announced the launch of the next version of CIRStatements on or about March 10th.

There are a number of new features and experiences coming with this new version. Everyone should have gotten an email from Sarah Berner last week with the details. There are 6 training sessions for everyone coming up starting on February 20th at 3pm CT.

[Click here](#) for a preview of those enhancements and see below for all the upcoming training options to register for.

I also have access to the demo environment so please free to reach out to me for a personal look.

Thursday, February 20 | 3:00 p.m. CT | [Register here](#)

Monday, February 24 | 3:00 p.m. CT | [Register here](#)

Monday, March 3 | 3:00 p.m. CT | [Register here](#)

Thursday, March 6 | 3:00 p.m. CT | [Register here](#)

Monday, March 10 | [10:00 a.m. CT | Register here](#)

Monday, March 17 | [10:00 a.m. CT | Register here](#)

[Resource page](#)

Tax Marketing Options at Cambridge

As tax season ramps up, clients may come to you with more tax-related questions. MarketCentral® offers a variety of complimentary, client-facing materials from Cambridge's sponsor partners to help support your conversations.

Cambridge's marketing portal can be accessed from the Tool Grid on cir2.com. Once on MarketCentral, visit Sponsor Materials > Client-facing Materials > Tax Planning to access resources designed to simplify these discussions. Sort by "Products (Newest First)" to find the latest tax materials, including:

- 2025 Tax Rate Schedules and Contribution Limits – Franklin Templeton
- Form 1040 Review Guide – Transamerica
- Easy Tax Reference Guide – Prudential

Log in today to explore these resources and check back often for new materials to keep clients informed throughout tax season.

Ascensus Hotline Update

Cambridge is pleased to announce an update to their [**Ascensus Advanced Sales Call Center hotline**](#).

With a new custom phone number, you can now call directly into the hotline without entering an Organization Number. This means quicker, easier, and more convenient access for all your needs. Simply dial the new custom phone number (877)-548-1132 and get connected instantly.

Innovate Sponsor Series



Equitable

Jim Daniello
Division VP

Email [**james.daniello@equitable.com**](mailto:james.daniello@equitable.com)

We are excited to have Equitable as our sponsor for Innovate in March. As part of the lead in to the event, Jim will be spending time discussing the value add options you can take advantage of today. He will also be reviewing the brand new Financial Planning EdgeBook.

[**Financial Planning EdgeBook**](#)

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