

Weekly Connections Call



Duncan

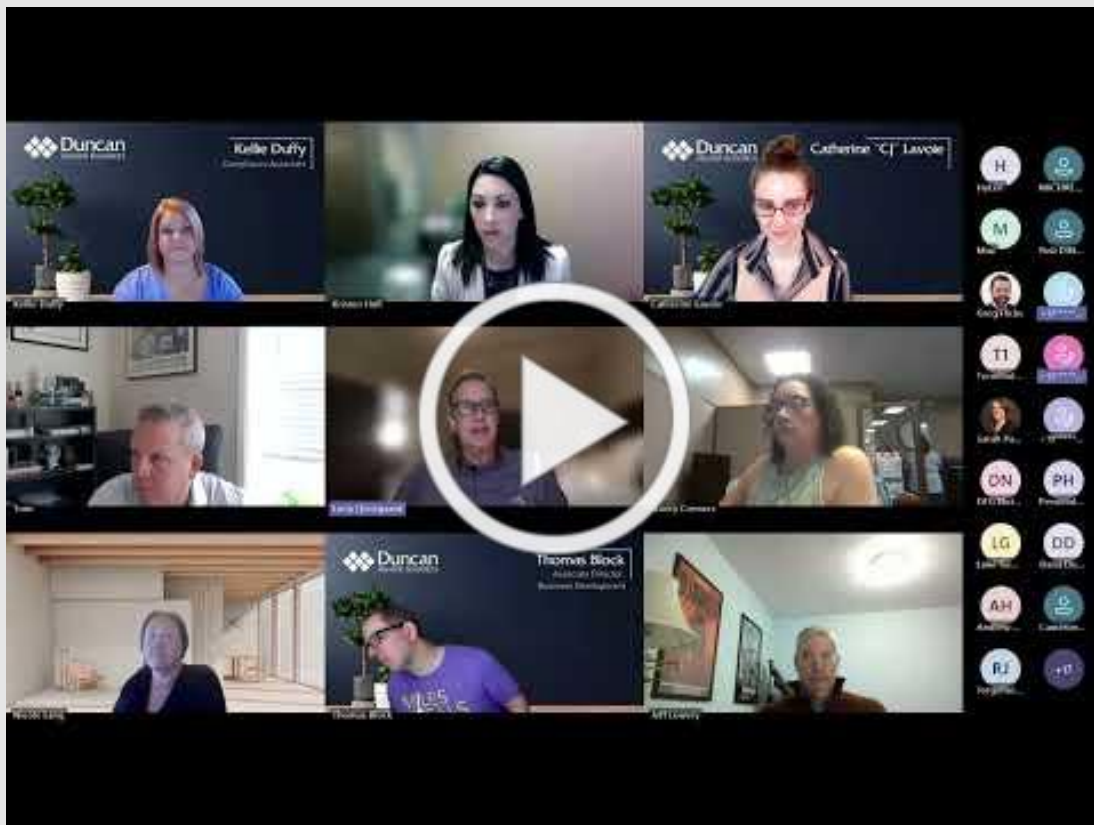
ADVISOR RESOURCES

Making It All Work **Together**

Today's Connection Call

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

[The AI Driven 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 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](#)

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.

May 1st - [CJ Solo/Admin Call - Calendar Invite Here](#)

May 7th - [Principal](#)

May 14th - [Federated Hermes](#)

May 21st - [Pacer](#)

May 28th - [Nationwide Retirement Services](#)

June 4th - [Lincoln](#)

June 11th - [Ategenos Capital](#)

June 18th - [Neuberger Berman](#)

June 25th - [Athene](#)

Duffy's Do's and Don'ts



[Understanding Best Interest Analysis Form Section 7: Fees](#)

Cambridge Compliance Alert dated 2/11/25 - Best Interest Analysis and Righbridge Product Profiler Best Practices. This is a great tool for tips on how to fill out the BIA.

Common NIGO reasons on the BIA. Current & New Account Fees & Expenses, Sections 7A & 7B. What boxes do I check? When do I use the notes section?

[Link to the Compliance Alert](#)



Ignite Registration is Open!

Cambridge's Annual Ignite Conference registration is now open. It will happen August 20-22 at The National Harbor in Maryland (south of Washington DC).

We will be doing our OSJ dinner on Thursday night, so we will need to know registration numbers by Mid July so please get yourself locked in as soon as possible.

[Click the link to get that done today.](#)

WOVE is Online

This week, the uplift of CIRStatements went live. There's an entire page dedicated to this change.

[Click the link to see that page.](#)

GrowthTech Summit

This 1.5-hour virtual summit (CE Credit eligible) will provide financial professionals with actionable strategies for leveraging technology to drive organic growth, enhance client experiences, and scale their practices. Attendees will explore the latest advancements in AI, the power of data management, cutting-edge prospecting tools, and the integration of modern tech stacks, equipping them with the insights needed to thrive in an ever-evolving industry.

Date: May 8, 2025

Time: 1:00 p.m. CT – 2:30 p.m. CT

[Register Here](#)

The Importance of a Succession Plan

A long-term plan to manage the transition of your business upon retirement. This can be a staged pullback, or full retirement. I encourage financial professionals to begin this process as soon as possible, and will advise you to consider various actions that, over time, can increase the value of your business and create a smooth transition plan for your chosen successor. This also includes a continuity plan for any disruption in your business that is not retirement.

Please reach out to me to schedule a discussion time of this topic.

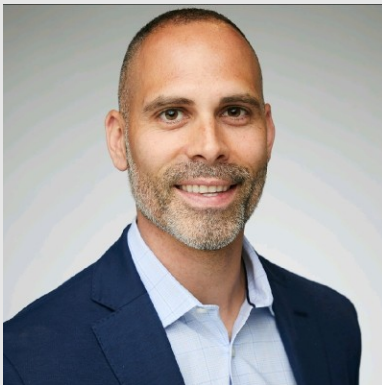
BNY Annual Conference – INSITE

At the same place as this year's Ignite, BNY will be holding a conference at National Harbor. Because of our relationship, they've included a promo code to give anyone at DAR, a free admission (\$799 value).

Quick Facts

- Promotional Code (100%): IN25C
- Date: June 3-5, 2025
- Location: National Harbor, Maryland
- Hotel: Gaylord National Resort and Convention Center
- Details:
<https://bny.cventevents.com/event/insite2025/summary>

Innovate Sponsor Series



Jon Kaplan

Pershing
VP, Relationship Manager
jonathan.kaplan@bny.com



Robert Jorgensen

BNY Wealth
VP, Client Strategist
Robert.jorgensen@bny.com

Steven Dalla

BNY Wealth
Senior Portfolio Manager
steven.dalla@bny.com

Join us for a recap of the main points from Jon's



presentation at Innovate, discussions that happened down at Amelia Island, where advisors at Cambridge are using Pershing/BNY Wealth to help clients, and a reminder of all of Pershing/BNY Wealth's capabilities.

[BNY Wealth Management Capabilities Overview](#)

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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