

Weekly Connections Call



Duncan

ADVISOR RESOURCES

Making It All Work **Together**



7/30/2025 Teams Meeting

11:00 AM ET - 11:45 AM ET

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.

[DAR OSJ Contact List](#)

Upcoming Connection Calls

Connection Calls are every Wednesday.
Got an idea for a call? Reach out to Thomas Block

August 6 - Buffering Your Investments with Innovators ETF's

August 13th - Building a Branch of FP referrals with Adam Parks

August 20th - NO CALL!

August 27 - Growing Your Retirement Plan Business with DAR

Plan to be a part of our call every Wednesday.

Duffy's Do's and Dont's



Transactions That Don't Require OSJ Review/Approval in Trade Review

Additional Annuity Review Questions for Clients Over Age 65 and/or Annuity Concentration Over 50%

Around the Business Block



New Prefix Alert for Pershing Accounts

New Pershing NextInvestor Login Experience

CRC Offline

Wealthscape Login Security Update

Business Opportunity - Duncan Walsh Advisors



Thomas Walsh, CFA

President, Financial Advisor

Email: tjwalsh@walshassetmgmt.com



David Duncan, CFP

Executive Chairman, Chief Investment Officer

Email: dduncan@duncangrp.com

Full June Market Recap

A few points of interest:

1. US Stocks were up strongly in June with the DJ Total Market Index ending the month at **+5.12%**. All capitalizations were positive for the month, with large cap showing the best return and mid cap the worst. Growth outperformed value in all capitalizations.
2. Large Cap Growth was the best US equity performer for the month (**+6.18%**), while Mid Cap Value was the worst (**+2.42%**).
3. Latin America was the best performing region (**+6.08%**) for the month, while Europe was the worst (**+2.06%**).
4. US Stocks was the best performing asset class (**+5.12%**), while US Real Estate was the worst (**+0.52%**).
5. US bond yields were down in June, with the index showing a **+1.54%** return for the month.
6. The average 30-year mortgage rate decreased 0.07% in June, to 6.77%.
7. Five of the eight US economic indicators were negative for the month.

As a member of this Cambridge Enterprise, you have access to dozens of investment managers for recommendations that fit your clients' needs and goals. Internally, we have a Team-Directed option called Duncan Walsh Advisors.

Duncan Walsh Advisors (DWA) provides 14 model investment portfolios to over 130 Investment Advisors of the Duncan Advisor Resources branch within Cambridge Investment Research. The advisors can manage the relationships with their clients, with the confidence that the investment management of their portfolios is under the guidance of DWA.

Join us for the main points from Tom and David's presentation, conversations they've had and a reminder of all of DWA's capabilities.

[Returns Sheet](#)
[About DWA](#)



MICROSOFT TEAMS LOGIN INFORMATION:

Add this as a reoccurring calendar item by copying and pasting the below information

Microsoft Teams [Need help?](#) **Join the meeting now**

Meeting ID: 225 046 541 089

Passcode: Wu9Lx3mu

Dial in by phone

+1 213-437-3904,,795156887# United States, Los Angeles

Find a local number

Phone conference ID: 795 156 887#

HELPFUL HINTS:

Remember to mute your lines:

there is a chat session throughout the meetings that can be used to submit questions. **There is no more private chats**

Remember to use the one-touch dialing option if you are using a mobile phone:

this feature enters meeting IDs automatically, so you do not need to manually enter any numbers or passwords

Meetings are scheduled to last 45 minutes, but will be recorded for later viewing if you are unable to attend

Larry L. Qvistgaard, II

President, COO

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