

# Weekly Connections Call



# Duncan

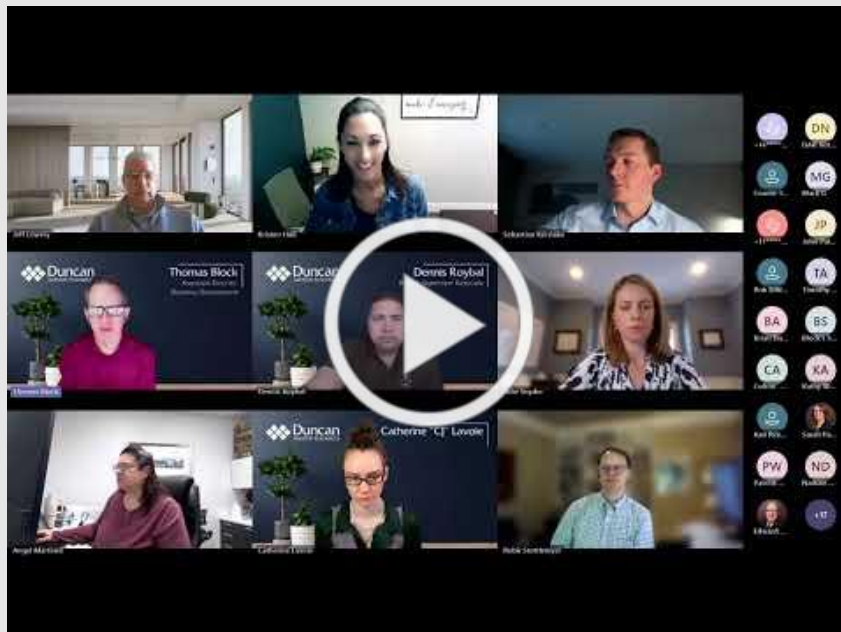
ADVISOR RESOURCES

Making It All Work **Together**

## Today's Connection Call

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

[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.

**SAVE THE DATE FOR INNOVATE!**

# INNOVATE

2026



**Our annual enterprise event Innovate, held May 20<sup>th</sup>-22<sup>nd</sup> at the Omni Resort in Hilton Head, SC, is now live to register!**

You'll notice on the site it says May 19<sup>th</sup>, and that's for those that need to fly in the day before. Unless you plan on flying out at the earliest flight available on Wednesday morning, get in the day before and relax around the resort.

As in the previous years, this is a two-part registration – for the event itself and for the hotel room.

We have an excellent agenda being crafted for you, and we will have Cambridge's CEO Amy Webber in attendance.

**[Registration](#)**

**[Hotel](#)**

**[Full Website \(Favorite this for updates\)](#)**

**SPECIAL DEAL FOR FINANCIAL PROFESSIONALS!**



## **Take advantage of this special discount from Zocks!**

We're excited to share that we have partnered with Zocks AI, to bring those affiliated with our Enterprise a **6 month free trial**.

### **Zocks AI helps advisors:**

- Analyze client sentiment to improve communication and relationships
- Track advisor performance with detailed scorecards
- Streamline processes with a built-in form filler
- Integrate with eMoney for a smoother planning experience
- Gain practice insights and user data to drive growth

**[Schedule your onboarding call here with our DAR account manager to start leveraging Zocks right away.](#)**, or scan the QR Code below.

**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.

April 29 - **Road to Innovate: Betterment**

May 6 - **Road to Innovate: TPGF**

May 13 - **Road to Innovate: Corebridge**

May 20 - **NO CALL: SEE YOU AT INNOVATE!**

June 3 - **DAR Financial Planning Team**

**Plan to be a part of our call every Wednesday.**

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



##### **AI Precheck in RegEd Communications Review**

Cambridge announced a new AI-powered enhancement, AI Precheck, launching April 27 within the RegEd Communications Review process. AI Precheck is an optional, pre-submission tool that allows users to run draft communications through an AI review before formally submitting them to Compliance.

The tool helps identify potential compliance concerns by flagging language issues, suggesting alternative wording, identifying potentially applicable FINRA rules, and recommending disclosures. All feedback appears directly within the draft submission so updates can be made prior to official review.

AI Precheck is intended to improve efficiency by helping users catch common issues earlier, reduce back-and-forth during Compliance review, and submit more review-ready materials. It is a support tool only and does not replace human Compliance review or

approval, does not identify all regulatory or firm-specific requirements, and does not guarantee approval.

A detailed user guide with step-by-step instructions is available in the [AI Compliance Precheck – Advertising Review](#) resource. Questions may be directed to the Compliance Advertising Team at [advertising@cir2.com](mailto:advertising@cir2.com).

## Tom's Business Block



### NEW MyRepChat updates

Cambridge is pleased to share an update to the MyRepChat app, designed to make messaging easier, faster, and more intuitive.

#### What's New in This Update

- A Cleaner, More Modern Messaging Experience: The interface has been redesigned to feel familiar, and more like the messaging apps you use every day so there's little-to-no learning curve
- Natural Gestures and Controls: Swipe to manage conversations, tap to reply, and move through the app with ease. No more hunting for buttons or digging through menus.
- Smarter, More Intuitive Layouts: Your conversations and contacts are now organized in a cleaner, more logical way, helping you manage communication more efficiently

This update is all about delivering a more powerful and user-friendly messaging experience.

#### Want a Preview?

Watch this [short video](#) to see what's changed and get familiar with the new interface.

Cambridge is currently testing the group chat feature that is expected to be released next month.

### Financial Planning – CLIC Advisor updates

Last week (April 16<sup>th</sup>), Cambridge released the newest updates to CLIC Advisor.

Some of the highlighted updates are:

- New Plan comparison: Faster, clearer decisions
- Needs Analysis enhancements and topics
- Long Term Care analysis
- Plan Summary report enhancements

To read the full release please [click here](#).

Some key integrations that went live are with Asset Map and Zocks.

If you need to get ramped up in Financial Planning, this is the time to engage with our Financial Planning Department. Reach out to [Kristen Hull](#).

## 2<sup>nd</sup> Q Business Review

As we move through the first full month of the second quarter, as you look back at quarter one, how did you do?

Are you down over last year? Increased but not what you needed? Marketing efforts that didn't pan out?

Whatever it might be, now is the time to schedule a review with me to talk about last quarter and how the rest of 2026 stacks up.

Click on this link to get on my calendar -> [LINK](#)

## Business Opportunity - Road to Innovate: Protective



### Sebastian Kerslake

Divisional Sales Manager - North

Email: [sebastian.kerslake@pacerfinancial.com](mailto:sebastian.kerslake@pacerfinancial.com)

### Tim Kane

Senior Key Accounts Manager

Email: [tim.kane@pacerfinancial.com](mailto:tim.kane@pacerfinancial.com)

*Sebastian and Tim from Pacer gave an engaging session on Pacer's approach; Pacer is built around supporting advisors through a dedicated, nationwide salesforce focused on in-person relationships.*

*Their goal is to make it easier for advisors to access timely portfolio conversations, actionable insights, and real support when and where they need it. This year, they're helping advisors access international opportunities, investing in the AI revolution, and utilizing Cash Cow series in a multitude of ways across portfolios.*

*Their website is also a great place to explore available solutions and resources. Please review the wholesaler map to identify the Pacer wholesaler supporting your territory.*

## MATERIALS FROM THE PRESENTATION:

## Team Oak Feedback Form

A feedback form is now available to make it easier to share experiences with Team Oak at Cambridge [here](#).

The form is flexible, and you may complete as much or as little as your schedule allows.

Your feedback and timely review of these items help us coordinate effectively with Team Oak leadership and improve the overall experience for our branch. Forms should be submitted directly to CJ ([catherine.lavoie@duncanar.com](mailto:catherine.lavoie@duncanar.com)).

Thank you for your participation!

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