

# Weekly Connections Call



# Duncan

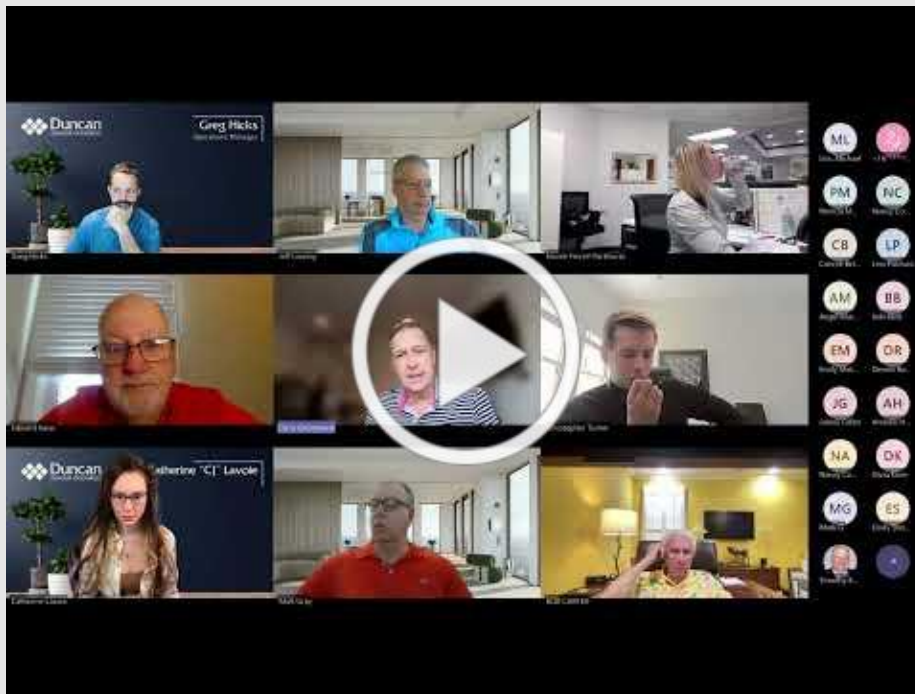
ADVISOR RESOURCES

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.**

**Cambridge Ignite 2026 - REGISTER NOW!**



## Registration for Ignite 2026 is live!

*(September 16-18 in Kissimmee, Florida)*

[Click here to register now.](#)

### Why come to Cambridge Ignite?

Ignite continues to prove why it's a standout event: a vibrant blend of motivational keynotes, immersive learning, and high-impact networking at every turn. It's a great opportunity to share, connect and exchange ideas with fellow advisors in real time.

**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, and we are working hard to fill the schedule.

**July 1 - Voya: Part of the Innovate Sponsor Series**

**July 15 - BNY: Part of the Innovate Sponsor Series**

**July 16 - NEW Quarterly AI Practice Management Connections Call (11am est)**

**July 22 - ACM: Part of the Innovate Sponsor Series**

**July 29 - Homestead Funds: Part of the Innovate Sponsor Series**

**August 12 - Inland: Part of the Innovate Sponsor Series**

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

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



#### **Investment Exchange Disclosure - Annuity Change to Form Name and Usage Guidance**

The Investment Exchange Disclosure – Annuity form will be renamed to Investment Exchange Disclosure – Annuity or Insurance Product.

The Investment Exchange Disclosure – Annuity or Insurance Product form should be used when liquidating any of the following products:

- Variable Annuities
- Registered Index-Linked Annuities (RILAs)
- Fixed-Indexed Annuities
- Fixed Annuities
- Variable Universal Life (VUL)
- Indexed Universal Life (IUL)
- Universal Life (UL)
- Whole Life policies

This form should not be used when liquidating one of the above products and moving into an annuity. In those instances, the Investment Exchange section is

incorporated within the Annuity Disclosure form, and no separate Investment Exchange Disclosure form is required.

The updated form is expected to be available on June 25, 2026. Please ensure the revised Investment Exchange Disclosure – Annuity or Insurance Product form is used after that date.

## Tom's Business Block



### Learn About the New Succession Planning Quiz

Wondering what's next for your business?

Watch the latest Cambridge Minute episode featuring Kris Emick introducing Cambridge's new Succession Planning Quiz.

After watching, take the quick, interactive [quiz](#) to explore your priorities and discover which succession path may be the best fit for your business. In just a few minutes, you'll receive personalized results, a recommended path forward, and a downloadable checklist with practical next steps you can start implementing right away.

Whether you're considering bringing in the next generation, merging with another firm, or planning your eventual exit, this is an easy way to begin planning for the future.

[Watch Now](#)

[Take the Succession Planning Quiz](#)

### CAAP Changes and new Wealthport paperwork

Cambridge has made updates to the WealthPort Wrap Client Agreement and Application and WealthPort – CAAP<sup>®1</sup> and UMA Strategy Election Form.





Cambridge has updated the WealthPort Wrap Client Agreement and Application, effective June 15, 2026.

The new version dated 060126 includes the following:

- WisdomTree models have been added to the investment strategist lineup
- OneAscent model series names have been updated

These are material changes; The WealthPort Wrap Client Agreement and Application version dated 032426 will continue to be accepted through July 15. As of July 16, the WealthPort Wrap Client Agreement and Application version date 060126 will be required and the older version dated 032426 will no longer be accepted.

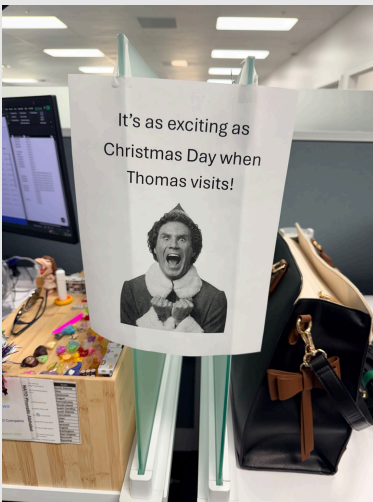


The new WisdomTree models added are the Siegel-WisdomTree Global Equity, Longevity, Moderate, Moderately Conservative and Conservative options with a 0.00% strategist fee.

### **A Review of my trip to Fairfield, Iowa**

The first face-to-face meeting between the Technology Advisory Council and the New Century Council happened last week at the Cambridge home office.

It also marked my very first visit to the campus. I can say without a doubt, it was a great homecoming of sorts with many associates I've known for years but have never met formally. I want to touch on what's coming soon from Cambridge that you should be prepared for.



· More integration with Zocks is coming and it'll be with Indy as Cambridge continues making it the main point of contact for a lot of your day-to-day work.

· Speaking of integrations, Redtail is now enabled in CLIC Workstation under Client Management just like you have with legacy CLIC. Wealthbox integrations are coming soon.

· Prepare to see more alerts and notifications inside CLIC Workstation in the coming month or two. The biggest update will be trade review alerts.

· Firelight for annuities – With the near 100% of all annuities approved now available through Firelight, now is the time to start submitting through this portal. In the next month or two, it will come down as highly encouraged from Cambridge that you submit there instead of trade review. The plan is to retire trade review and webcapture as a new business submission process and annuities will be step one.

· The next step to retire from trade review submission will be financial planning. A new account opening process is close to being open for beta testers. The FPE will be reduced and all done through the Client Management section of CLIC Workstation. I saw it

demonstrated and it is much faster than in the legacy CLIC system.

- Next Generation Financial Professionals – A lot of work has been done in creating a better educational and recruiting environment for Next Gen FP's. Expect a lot of details on this around Ignite.

- Succession Planning – As I mentioned, there's a survey that was created which I would highly recommend you do. We requested the Executive Council and internal website be created around those looking to sell and qualified buyers. This will not negate the importance of our work as your OSJ, but with the release of Business Analytics, we now have better data that can be used to showcase potential practices for sale in a way that didn't exist before.

With all this being said, the advancement of technology at Cambridge is here. Do not procrastinate any more. I would highly recommend getting on my calendar to learn more about these tools AND also get yourself to Ignite in September.

**My calendar - <https://calendly.com/thomas-block/60min-zoom-practice-management>**

**Registration for Ignite - [https://web.cvent.com/event/a631f854-6f8a-4e06-89d3-cc609d667b9e/summary?utm\\_campaign=Events&utm\\_content=ignite26&utm\\_medium=Banner&utm\\_source=cir2&utm\\_term=LearnMore](https://web.cvent.com/event/a631f854-6f8a-4e06-89d3-cc609d667b9e/summary?utm_campaign=Events&utm_content=ignite26&utm_medium=Banner&utm_source=cir2&utm_term=LearnMore)**

## Part of the Innovate Sponsor Series - Federated Hermes



### **Michael Liss**

Senior Vice President, Senior Regional Consultant

Email: [mike.liss@federatedhermes.com](mailto:mike.liss@federatedhermes.com)

*Mike discusses complementing cash and gathering assets with the Federated Ultra Short Bond Funds.*

### **Materials from the Presentation:**

[Performance & Price Report FMUSX](#)

[Performance & Price Report FGUSX](#)

[Performance & Price Report FULIX](#)

[The real outcome Certificates of deposits](#)

[Low Duration Brochure](#)

## 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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