Weekly Connections Call

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 DAR Dinner - RSVP NOW!

When: Thursday, September 17th
Where: Wreckers Sports Bar (Gaylord Palms Resort & Convention Center)

RSVP for DAR dinner at Cambridge Ignite here!

You’re invited to join Duncan Advisor Resources and our great partner Cambridge, along with several sponsors, at **Wreckers Sports Bar & Lounge** for our annual Ignite DAR dinner!

Don’t miss this chance to connect with more of the team. You'll get a sneak peek at what's ahead for Cambridge, have the chance to connect with our team and engage with some of our top product partners.

Thank you to our dinner sponsors Eagle Point Credit Management, Innovator ETFs and Prudential for another amazing evening at Ignite.

The entire team hopes to see you in Florida!

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.

September 2 - DAR Financial Planning Team

September 9 - DWA Update

September 16 - NO CALL. SEE YOU AT IGNITE!

Plan to be a part of our call every Wednesday.

Adam's Compliance Avenue

CIR NIGO's and Alternative Investment Advice

Access the full presentation here.

Tom's Business Block

Ignite + Dinner = Fun Times

With Ignite registration officially closed, our marketing team sent out an RSVP for our Thursday night dinner this week to everyone who has registered. Please complete this by September 1st, so we can coordinate with Wreckers on our expected number.

If you did not see an RSVP email, please complete the survey link that is attached to this call notes email.

We have close to 60 Financial Professionals and Admins attending this year's Ignite and the entire team can't wait to see you.

The agenda looks to be about complete. Please review it here -> Ignite Agenda

Share You Thoughts on CIR Tech

As I am preparing for Ignite, I want to hear from you about the latest technology Cambridge has released this year. Great stories will go a long way. Please email me where the following technologies have most impacted you positively:

- Indy the AI tool
- CLIC Workstation (just as the new platform)
- Firelight

- Client Management
- Business Analytics

Drop me a line at Thomas.block@duncanar.com

CLIC Advisor/CLIC Client updates

Cambridge is pleased to offer a wide array of technology solutions to support your evolving business needs.

Through CLIC® Advisor/CLIC Client, financial professionals have access to tools designed to help enhance the planning experience for both advisors and clients, including financial planning capabilities, digital marketing resources, and client engagement solutions.

Additional optional upgrades are also available, including Advanced Planning, a comprehensive financial planning tool; Bamboo, a digital marketing and engagement tool; and the new Premium Client Portal.

The Premium Client Portal is a powerful enhancement to the CLIC Advisor/CLIC Client experience. The Portal includes access to a mobile app and provides clients with a personalized digital experience, allowing them to view their full financial picture, track progress toward goals, securely store documents, and collaborate more seamlessly with your office. Available for $900 annually, the Premium Client Portal allows you to provide mobile app access to an unlimited number of clients.

As Cambridge continues to invest in and enhance these technology solutions, updated Enterprise pricing for select CLIC Advisor/CLIC Client upgrades will take effect September 1, 2026. Updated annual pricing for the affected upgrades is as follows:

- Advanced Planning: $2,200
- Bamboo: $1,100

The standard CLIC Advisor/CLIC Client platform remains included in your monthly CLIC Core Services fee and is unchanged. Users can review their current enrollments by accessing the CLIC Workstation and navigating to Financial Planning > CLIC Advisor > My Enrollments.

CLIC Generated Forms – 60 Days!

In news that shows Cambridge's commitment to resolve issues in the field, Cambridge Nation was active a month or so ago about the short time that CLIC generated forms stay active at 30 days.

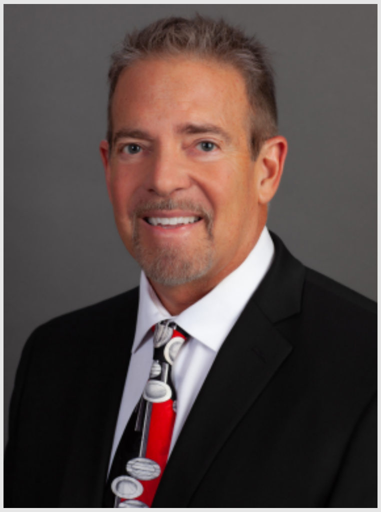
Documents generated in CLIC® will now remain active for 60 days, whether they have been sent for signature or are still in draft status.

- **Draft Documents:** Documents generated in CLIC that have not yet been sent to Docusign to create a draft envelope will remain active and editable for 60 days from the date they are generated

- **Completed Envelopes:** Envelopes that reach 60 days after completion without a Trade Key being generated will automatically expire. To continue processing, a new envelope will need to be created.

For questions on anything CLIC related when it comes to generating forms and training new staff, please reach out to Greg Hicks
greg.hicks@duncanar.com

TruChoice with Alan Roman



Alan Roman, JD, LLM, ChFC®, CLU®
Director – Product & Advanced Strategies
Email: ARoman@ConnectWealthSolutions.com

Top Ten Tax Traps is a "moving target" of the most frequent questions received in Advanced Markets. Several OBBBA changes will be added soon, but Alan highlighted them during the presentation.

MATERIALS FROM THE PRESENTATION:
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).**

Thank you for your participation!

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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Duncan Advisor Resources | 311 Main Street | Irwin, PA 15642 US