

Weekly Rep Call *WEBINAR*

Click [HERE](#) to watch a recording of this week's rep call.

Call Notes (Click on the [red](#) links to learn more):

Compliance/Administration

- Upcoming deadlines!

2020 Annual Registration Renewal Invoice

- 2020 Annual Registration Renewal Invoices will be available in the Registration Renewal section of the CLIC dashboard on or around November 19. This is a new location from previous years.
- You will be required to review the states listed on your invoice and verify the states in which you need to be registered for 2020.
- Additional information is available [HERE](#)

Practice Management

- T. Rowe Price Investment Services

This week we were introduced to T. Rowe Price's Signature Portfolio Construction Solutions

This is a suite of practice management offerings that combine the same portfolio design principals underlying their \$300B+ multi-asset franchise with practical implementation ideas.

T. Rowe's Mike Kubik and Megan Hopps introduced us to:

* "Art of Clean Up": quantitative due diligence tool to help streamline your asset managers

* "Model Construction": service that helps you develop proprietary suites of risk-based models

* "Asset Allocation Model Review": service that refines your models and helps you make incremental changes.

* The presentation covered on the webinar is available [HERE](#)

- Samples covered during the webinar

- [AOC Sample Analysis](#) for Your Consideration
- [AOC Sample Summary](#) Report Select List
- [AAMR](#) Sample Template

- For Additional information, please contact:
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