

News for Immediate Release

Cambridge Names Regina & Mike Quirk to 2024 Circle of Excellence

Achievement recognized at annual conference in June

Norwell, Massachusetts – June 09, 2024 – Mike & Regina Quirk of Strategic Financial Services have been named to the 2024 Circle of Excellence, the highest level of achievement recognized by their financial solutions firm, Cambridge Investment Research, Inc. (Cambridge). This recognition is granted to financial professionals who have displayed strong leadership in their field as well as a commitment to upholding Cambridge's core values of integrity, commitment, flexibility, and kindness while providing exemplary service to their clients.

Cambridge's Circle of Excellence qualification is earned by financial professionals who demonstrate their commitment to serving the needs of their clients, while maintaining an independent, service-driven mindset. Introduced in 2023, the Circle of Excellence distinction provides opportunities for financial professionals to meet other leaders in their field, gain exposure to new perspectives, and continue to hone their skills and talents.

Qualifiers gathered in Vancouver, British Columbia in June and were joined by members of Cambridge's senior leadership team. The multi-day event included networking sessions, inspiring speakers, and exclusive educational opportunities while providing an opportunity to learn from industry leaders, discuss developments in the financial services space, and meet other independent financial professionals who demonstrate a commitment to service. Honorees engaged in community-building activities, shared experiences, fostered connections, reviewed the latest trends, and returned to their practices with an ignited passion for serving their clients at the highest level.

"We are honored to have Regina & Mike as a Circle of Excellence qualifiers," said Cambridge President of Growth and Development Jeff Vivacqua. "Culture and success go hand in hand, and at Cambridge, we strive to provide a culture dedicated to service. Regina & Mike have demonstrated their commitment to our core values and a true passion for serving their clients. We aim to offer opportunities for our independent financial professionals to share different perspectives and collaborate with colleagues and peers to grow their leadership in the industry."

About Strategic Financial Services

Founded in 1995 and headquartered in Norwell, MA, Mike & Regina's firm has been dedicated to serving clients nationwide for nearly 30 years. Known for building personal relationships with their clients as Family Wealth Managers, the firm leverages cutting-edge technology to enhance the client experience with a robust digital component. Their expertise has guided clients toward achieving financial freedom in retirement, encouraging them to "Own Your Decade."

About Cambridge

Cambridge is a financial solutions firm focused on serving independent financial professionals and their clients while preserving its internal control. Cambridge offers a broad range of choices for independent financial professionals regarding solutions for advice, growth, technology, and independence. Cambridge's national reach includes: Cambridge Investment Research Advisors, Inc. – a large corporate RIA; and Cambridge Investment Research, Inc. – an independent broker-dealer, member FINRA/SIPC, that is among the largest internally controlled independent broker-dealers in the country.

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The 2024 Cambridge Circle of Excellence award is based on personal and/or office production benchmarks established by Cambridge. This award is not based on investment performance or indicative of client experience.

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