

Click the button below to view the recording of last week's rep call.

Call Notes (Click on the **red** links to learn more):



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

Compliance/Administration



Drivers License Extensions

- Typically, Cambridge does not allow for expired driver's licenses to be used for identification purposes when opening accounts for Customer Identification Program (CIP) purposes. There has been flexibility granted by some states to extend the validity of a driver's license past the expiration date due to COVID-19. Please use the chart [here](#) to check if the client's driver's license may have a state extension. If an allowable form of identification is used for verification, unexpired or expired and allowed, there is no further CIP requirement. The list is subject to change as each state re-evaluates its response. Additionally, you may receive an error on CLIC but will still be able to process new account information. These extensions may result in a minor delay.

Morningstar Annuity Intelligence

- Today we reviewed how a single printout will expedite the annuity review process.
 - This printout is available from [Morningstar Annuity Intelligence](#)
 - Using the printout as a guide when completing the Variable Annuity Disclosure form should decrease the potential for errors.
 - This form can be included with your account paperwork to help expedite the review process.

Video Conferencing

- Cambridge allows for the use of video conferencing as part of a financial professional's tool set to service clients
- As an important reminder, you should disable messenger and chat features during video conferencing
- Cambridge has compiled a [guide](#) to help you in selecting the right software and hardware to conduct your own video conference
- If you are hosting a meeting for a group of clients, you

should submit a meeting outline or overview, invitations, PowerPoint presentations, and any other prepared materials through CLIC AdView for preapproval

- Additionally, if you record the meeting or presentation to share at a later date, the recording will need to be submitted for preapproval.
- If you are hosting a one-on-one client meeting, you would not need to submit a meeting outline or overview. However, as with group meetings, any content shared from your screen should be submitted as correspondence or captured via email.

Practice Management



CLIC Client

- Make sure that your clients know that you can provide them with financial planning services.
- This could be a service that your clients want and if they don't know that you provide the service they could look elsewhere.

Video Conferencing

On this week's call we discussed some of the ways reps are utilizing video conferencing to market and educate

- A great option to utilize video conferencing is if you manage a 401K. You can record the enrollment meeting and have the company host it on their internal intranet.
- If you don't like writing long emails or newsletters, consider recording yourself reading articles and sharing the recording with your clients or posting them on your website.
- Creating a video does not have to be complicated and you probably already have all of the needed tools
- Once the video has been created and edited you will need to host the video somewhere. An extremely popular option is YouTube.
- Instructions to setup a YouTube Studio account, upload a video, and share that video are available [here](#)



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