

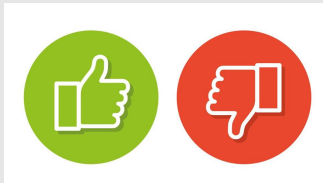
Click the button below to view the recording of last week's rep call.

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**

## 2021 DAR Branch Meeting: Cast YOUR vote!



For those of you who completed the survey for the Annual Branch Meeting, THANK YOU! For those of you who haven't or cannot find the original email, [here](#) is the link. We truly value your opinion and ask that you take a couple minutes to complete the survey.

## Compliance/Administration



### Alerts:

- Cambridge virtual audit notifications
  - Cambridge has enlisted a third party, Essential Edge, to assist with performing this year's virtual audits. If you have been selected to receive your branch review via this provider, you will receive an E-mail (example [here](#)) with a scheduling link. John Driscoll will be reaching out to everyone impacted, and will help answer any questions you may have
- ERISA retirement plan audits
  - Cambridge is conducting an audit of data and document integrity for ERISA plans in the system. If any of your ERISA plans require additional or updated paperwork as a result of their findings, you will receive an E-mail (example [here](#)) with additional **instructions** on how to submit the necessary documentation. Watch the recording for a walkthrough of how to generate a 408(b)(2). For additional CLIC assistance, contact Greg Hicks:

**T: 800.517.9901 x2231**

**C: 801.999.0044**

**E: [Greg.Hicks@cambridgesecure.com](mailto:Greg.Hicks@cambridgesecure.com)**



### Transamerica's Annuity Transition:

- What's going on with their annuity product line and riders
- Time frame for business submission deadlines
- For help contact your wholesaler or call 1-800-851-7555

- To see the details, [Click Here](#)

## Practice Management



Cambridge Investment Research, Inc.  
Tonya Tedrow | Manager, Client Solutions

### Utilizing Cambridge Source to help your business

Are YOU burning \$100/hour doing your own client servicing or document generation? If you do the math, you might be surprised to find out how much you could actually save by spending the sum for a dedicated Cambridge Source specialist. In this recording, Tonya takes a detailed dive into calculating what your time is truly worth, as well as insight into how Cambridge can help minimize your workload and maximize your revenue growth.

### Larry L. Qvistgaard, II

President, COO

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