

# Weekly Rep Call

5/18/2022



Making It All Work Together

## Today's Rep Call

Click the button below to view the recording of today'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**

## Upcoming Rep Calls

**May 25th** - CNR Speedometers

**June 1st** - First Trust

**June 8th** - FS Investments

**June 15th** - Inland

**June 22nd** - Pacific Oak

**June 29th** - Apollo (Formerly Griffin)

**July 13th** - Bluerock

**July 20th** - Stepstone/Conversus

**July 27th** - Sierra Investments/Ocean Park Asset Management

## CJ's Compliance Corner

**Updates:**  
**RightBridge**

Beta testing began this week. Stay tuned for more!

**Source of Funds requirements**



Effective immediately, Cambridge will allow five business days for source of funds information to be provided when checks are deposited via the clearing firm's mobile applications (NetXInvestor and Wealthscape Investor).

Contrary to the previously issued weekly announcement, Cambridge will not hold mobile check deposits for the five-business day period. Rather, they will deposit upon receipt and follow up throughout the grace period to obtain source of funds

For full details, click [here](#)

## Around The Product Block



### New Transamerica RILA

Effective this week, Transamerica's new RILA product is live on the Cambridge platform. To see more details about it, [visit the website](#). Rate sheet and details on the Best Entry crediting strategy can be reviewed [here](#) and [here](#)

### Cambridge Connect

Look at your availability for June 14-16 in Denver Colorado for Cambridge Connect: Growing Your Business... The Cambridge Way. With insightful sessions, an engaging keynote, and peer networking opportunities, learn how we can help you turn industry trends into strategy opportunities for your business. They will equip independent business owners like you to build up your business for the next ten, remain relevant in a digital era, and become a sought-after resource for your next generation of advisory clients.

### Look at the Branch Meeting Page

First off, get ready to SIZZLE with excitement with this review of the DAR Branch Meeting by [clicking here](#). After that, head on over to the DAR website by [clicking here](#) and looking at all the presentations and pictures from our three day event.

## Investment Opportunity



### CreativeOne - From Marketing to Product Offerings

**Sarah Williams**  
VP, Marketing Communications  
[SWilliams@creativeone.com](mailto:SWilliams@creativeone.com)



**Andrew "Drew" McDermitt**  
Business Development Director - Annuity Sales  
Registered Products Guru  
[AMcDermitt@creativeone.com](mailto:AMcDermitt@creativeone.com)

Branding, Credibility, Practice Management, Prospecting - The 4 main pillars of your marketing plan. Are you good at all of them? Some of them? None? Listen in as Sarah gives a quick recap from the Branch Meeting on the must do's in your marketing plan heading into the second half of this year and how you can

leverage her expertise to shine bright.

As the Registered Index Linked Annuity product shelf grows at Cambridge, it's good to have a basic understanding in how the product works, why is it popular, and who's a target client. Listen in as Drew helps you understand the lingo and how you can leverage his expertise.

### Speakers Attachments

[Who to contact at CreativeOne](#)

[RILA 101](#)

[CreativeOne Marketing](#)

### Larry L. Qvistgaard, II

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