

A FINANCIAL ADVISOR'S GUIDE TO VIRTUAL MEETINGS



PLATFORMS FOR VIRTUAL MEETINGS

The platform itself is not significant; connecting with your network is. The platform is the meeting venue, not the main event.

Which platform?

- Check with your firm to identify your approved platform(s).
- Of the platforms available to you, select the one that your client is the most comfortable with.
- **Zoom** is one of the few platforms to have the breakout room feature.
- **Cisco Webex** has People Insights, allowing you to understand more about the people attending your educational seminars.
- **Microsoft Teams** is fully integrated with Office 365, which may be convenient for you and your client.

Help your client through the setup process

- **Phone:** Talk your client through downloading the app.
- **Email:** Send step-by-step instructions.

Share the benefits of a virtual meeting with your clients

Face-to-face connection

- Clients prefer to see your face during the meeting to gauge your reaction.

Screen share

- Your client will be able to more easily follow your handouts, such as a portfolio or slides.
- Your client will be able to share their own material such as an early retirement offer or a workplace compensation plan.

Visit columbiathreadneedleus.com

Advisors must log in or register to access all resources.

References to third-party platforms are for illustrative purposes only and should not be construed as recommendations.

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