COLUMBIA THREADNEEDLE INVESTMENTS

A FINANCIAL ADVISOR'S GUIDE TO

VIRTUAL MEETINGS

STRUCTURING A MEETING

Virtual meetings are likely to become a permanent part of doing business for financial advisors. In a virtual setting, it's harder to just let the conversation flow, so it's best to structure your meeting in advance.

Adjusting for a virtual meeting environment

- At the beginning of the meeting, ask your client what would make your time together a success.
- It's OK to acknowledge any interruption or activity in the background.
- Use quality information and strong visuals.
- Avoid the temptation to talk faster than usual.
- Pause often to ask the client if they have questions.
- At the end of each meeting, ask your client if their needs were met.

Checklist for team presentations

Be clear about who does what on the day

- Host/producer to run the webinar
- Lead presenter
- Chat moderator

Rehearse beforehand

- Plan for how you'll handle hand raising.
- Will mics be muted?

Consider using a second device to communicate with your team.

MEETING
When all participants can share their cameras at once.

WEBINAR
When only a few selected participants can share their cameras.

Visit columbiathreadneedleus.com
Advisors must log in or register to access all resources.

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