**Virtual Meeting Best Practices:**

**Tips and Guidelines On Getting The Most Out Of Your Client Review**

At [FIRM NAME], we hold all of our client meetings virtually over Zoom, which allows us to serve you efficiently and gives you the convenience of meeting with your financial advisor from the comfort of your own home.

At the same time, we recognize that not all of our clients are equally familiar or comfortable with virtual meetings. And even for those who are used to them, there are some unique aspects to calls over video that can occasionally provide hurdles to communicating as effectively as in an in-person meeting.

For this reason, we’ve created this guide to help you get the most out of your virtual meetings. The pointers below aren’t hard-and-fast rules but are instead meant to be taken as guidelines to help minimize distractions and keep you comfortable.

If you have any suggestions on how we can improve the virtual meeting experience, please feel free to reach out!

**Setting Up For Your Meeting**

* Find a location to meet that’s quiet, comfortable, and free of distractions. If you’re at work or in a public place, try to find a secluded spot where you won’t be interrupted.
* Please don’t try to log into your meeting if you’re driving – we can always reschedule, but your safety comes first!
* Ensure that you have a good high-speed internet connection. If you’re using Wi-Fi, make sure there is a strong signal.
* If your computer doesn’t have a good-quality built-in camera, microphone, or speakers, we recommend purchasing these to ensure there are no communication issues due to video or audio quality. We’ve found that the following options work well:
	+ Webcam: [Logitech C920S](https://www.amazon.com/Logitech-C920S-Pro-HD-Webcam/dp/B07K986YLL/ref%3Dpd_lpo_sccl_1/147-5525772-9898214?pd_rd_w=N134k&content-id=amzn1.sym.116f529c-aa4d-4763-b2b6-4d614ec7dc00&pf_rd_p=116f529c-aa4d-4763-b2b6-4d614ec7dc00&pf_rd_r=93NVXS20H3PT2TJ7Z6C2&pd_rd_wg=Rz3md&pd_rd_r=2e107074-4a28-4738-bbc4-ac81980653d0&pd_rd_i=B07K986YLL&psc=1)
	+ On-ear Bluetooth headphones (with embedded microphone): [Jabra Elite 45h](https://www.amazon.com/Jabra-Elite-Titanium-Black-Ear/dp/B0865439LD)
* Find a comfortable chair to sit in and, ideally, a desk or table for your computer (if you’re using a laptop). If you want to take notes, have a notepad and pen handy before the meeting begins.

**During The Meeting**

* We recommend turning off the ‘self-view’ function in Zoom to minimize distractions. (We all like to look at ourselves – it’s OK; we do it too!)
* We recommend having the Zoom window in full-screen mode and/or closing other windows and tabs on your screen. Silence your cell phone if it may serve as a distraction during the meeting.
* We like to keep the camera on as much as possible during the meeting, but feel free to request a break at any time.
* Feel free to use a ‘virtual’ meeting background if you’d like.