What you can expect from a virtual meeting

Virtual meetings can be a convenient way to engage with your financial professional. Your financial professional will discuss the specifics of the process with you. But to get you started, here is an overview of what you can expect:

1 THE INVITATION

- Your financial professional will invite you to an introductory call via their preferred virtual meeting platform.
- The objective of this call will be for you to get to know your financial professional and to discuss your goals and objectives.

2 PREPARING FOR THE MEETING

- Your financial professional will email you a secure fact-finding questionnaire to complete, either on your own or with him/her.
- When complete, you will securely upload the questionnaire and any other requested documents.

3 INFORMATION REVIEW

- Your financial professional will review and analyze your information based on your conversations, and will create a customized solution for you.

4 SCHEDULE FOLLOW-UP

- Your financial professional will then schedule another virtual meeting with you to review his/her customized solution and to answer any questions you may have.

5 COMPLETE PAPERWORK

- Your financial professional will verify your identity, and together you will complete all necessary paperwork online.
- You will sign the paperwork that is emailed to you.
- Copies of the completed paperwork will be emailed to you for your records.

6 STAY IN TOUCH

- Moving forward, your financial professional will schedule regular phone calls or virtual meetings (quarterly, semi-annually, or annually) to review your customized solution.

Questions? Please contact your financial professional.

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