spend time
FINANCIAL PLANNING

Instructions for using Zoom

We offer all our clients the option to meet online using an app called Zoom. We will be able to see and hear each other on the call. We'll also be able to share our screen so you can see the same information as you would at a face-to-face meeting. You will also be able to share your screen with us if there is anything on your computer you want us to see.

We understand that video meetings might be new to you. If it is, we want to reassure you that there's no need to be nervous. But, to help it go as smoothly as a face-to-face meeting we've created some tips to help you.

1. You can use any device with speakers, microphone and camera, including tablet, smart phone, laptop or desktop
2. The link you will need for our video call will be emailed to you prior to our meeting
3. Please click the link a few minutes before our scheduled start time
4. If you have not used Zoom before it will prompt you to download Zoom, or you can simply use it within your web browser.
5. If asked whether you want to open Zoom, click 'Open Zoom'
6. If asked about cookies, please click 'Agree and proceed'
7. Check that your speaker isn't muted, or volume turned down
8. If asked, click 'Test Computer Audio' to confirm that both your speaker and mic are working
9. Then wait for me to start the meeting
10. You will then be asked whether you want to join the meeting with or without video; if you are happy, please click 'Join with video', then click 'Join with computer audio', so that we can get the most out of the meeting.
11. You should then be able to see and hear me.

Troubleshooting

The main two problems we tend to find people have are with sound and video. If you cannot see or hear us, please move your mouse to the bottom of the Zoom window where you will see 'Mute' and 'Stop Video'. If either of these has a red line through them, please click them to remove the line. This will turn on your mic/camera.

If you are still having difficulties, you will see the 'Chat' function towards the middle of the Zoom window. You can use this to type messages to us. If you have any questions or queries about our meeting and how to use Zoom, please drop me a line back or call 07855 279641. Otherwise, we look forward to meeting with you.