

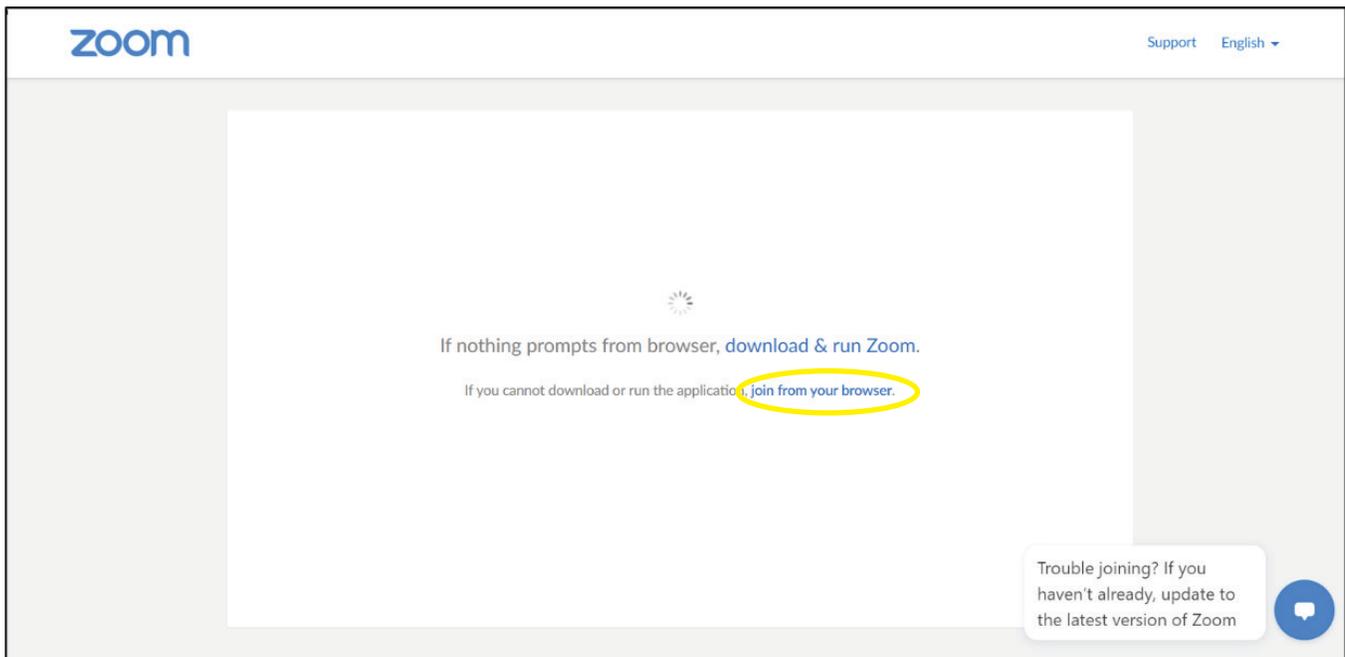


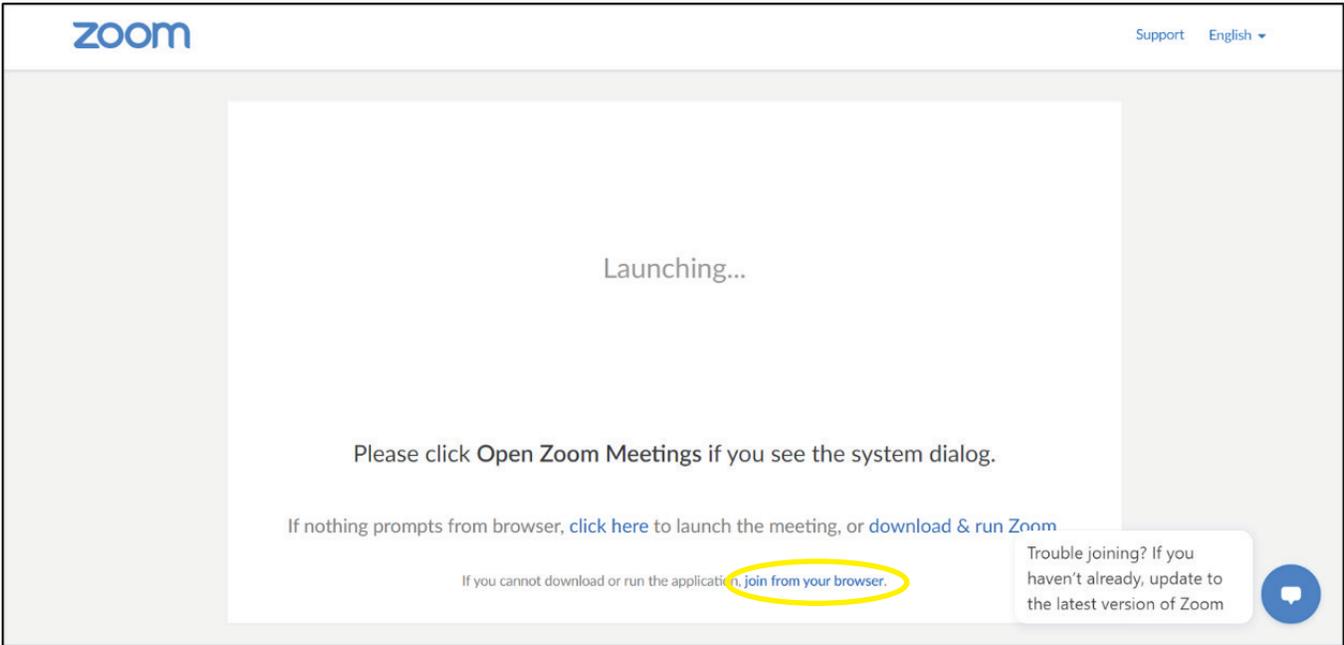
Thank you for choosing a Zoom meeting with Allworth Financial. Here are some tips to help you join and navigate your Zoom meeting. If you have any questions or have trouble joining, please don't hesitate to contact your advisor or give us a call at (800) 482-2196.

Join a Meeting

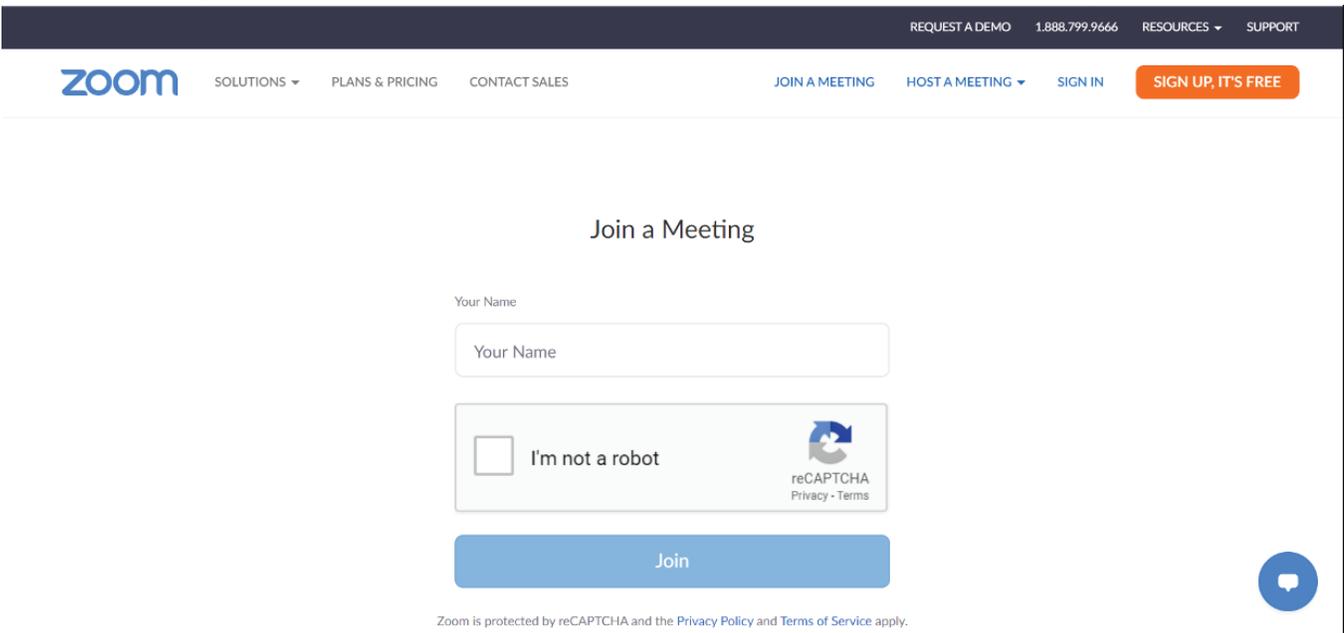
1. You will receive an email with a link to join a Zoom meeting.
2. When you click on the link, it will open your internet browser. You may download and run the Zoom application or join from your browser.
3. If you decide not to download Zoom, you can still join the meeting from your web browser.

Click on "Join from your Browser" in either of the two places shown below.



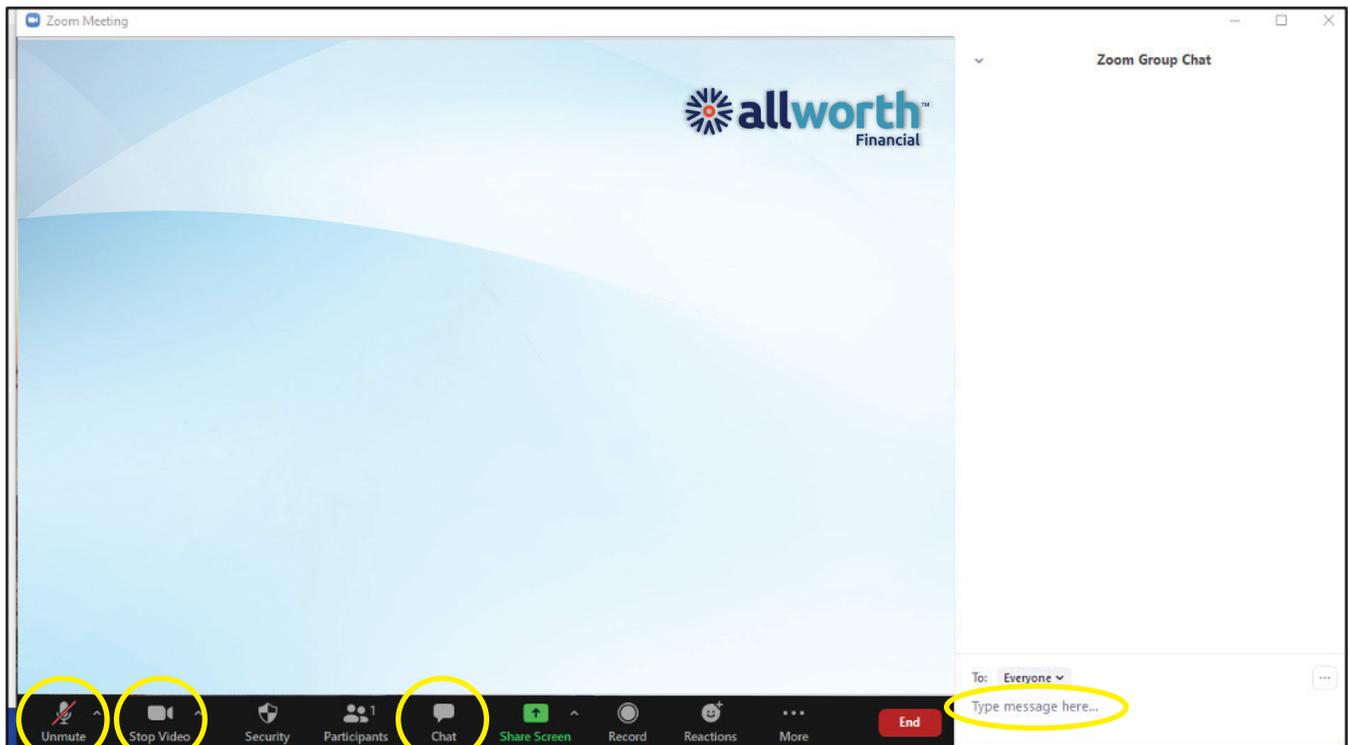


4. On the next screen, type in your name and check the box next to "I'm not a robot," then hit "Join." This will take you to your meeting with your advisor.



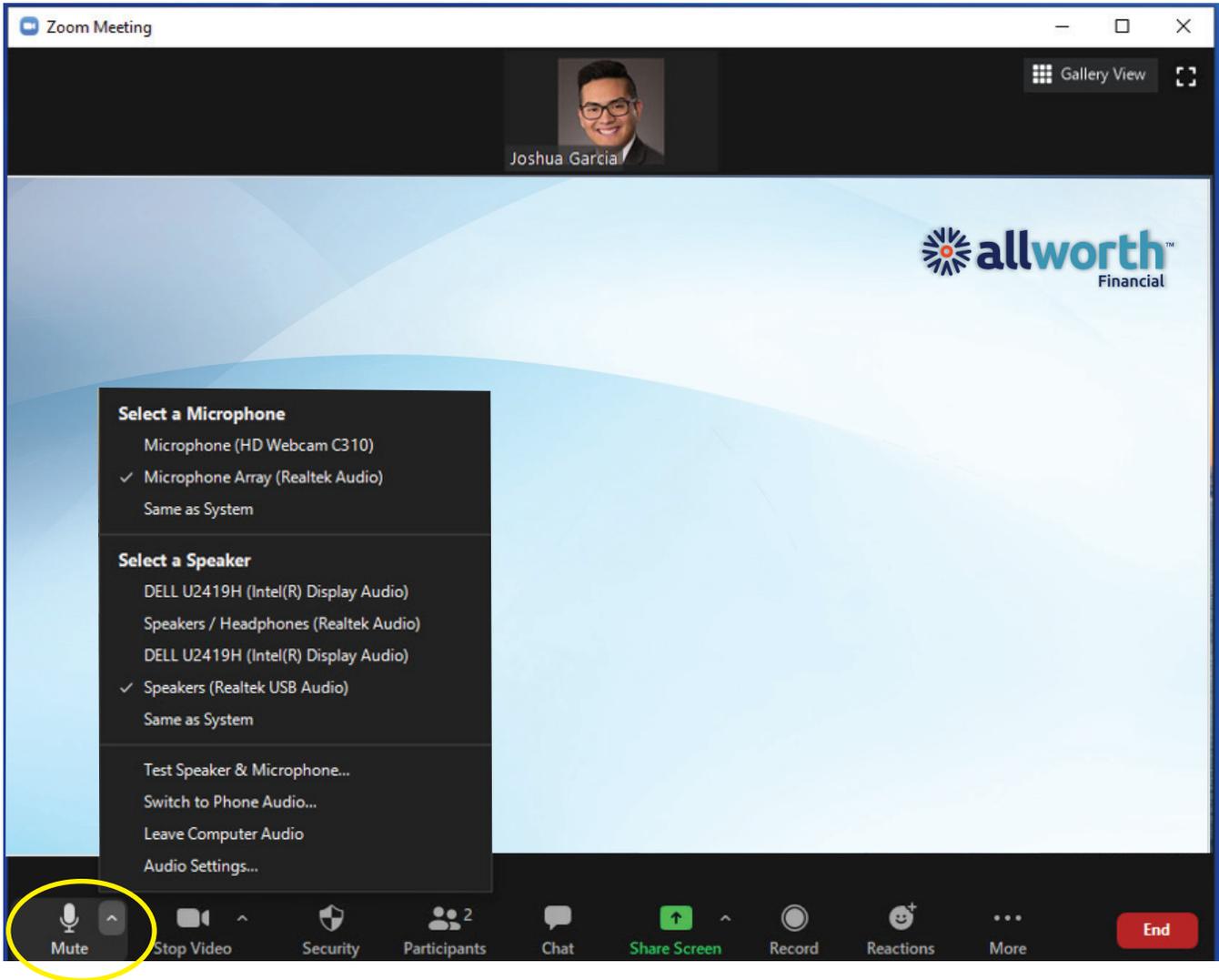
Start/Stop Audio and Video Settings (And Using Chat)

1. At the bottom left, when your cursor moves over the screen, you can click to start your audio and video for the meeting.
2. We also recommend that you open the "Chat" button in the bottom middle of the screen. This will let you chat with your advisor, should you have any difficulties setting up the video and audio.
If you encounter any audio/visual technical difficulties, your advisor will call your phone to help walk you through the process.

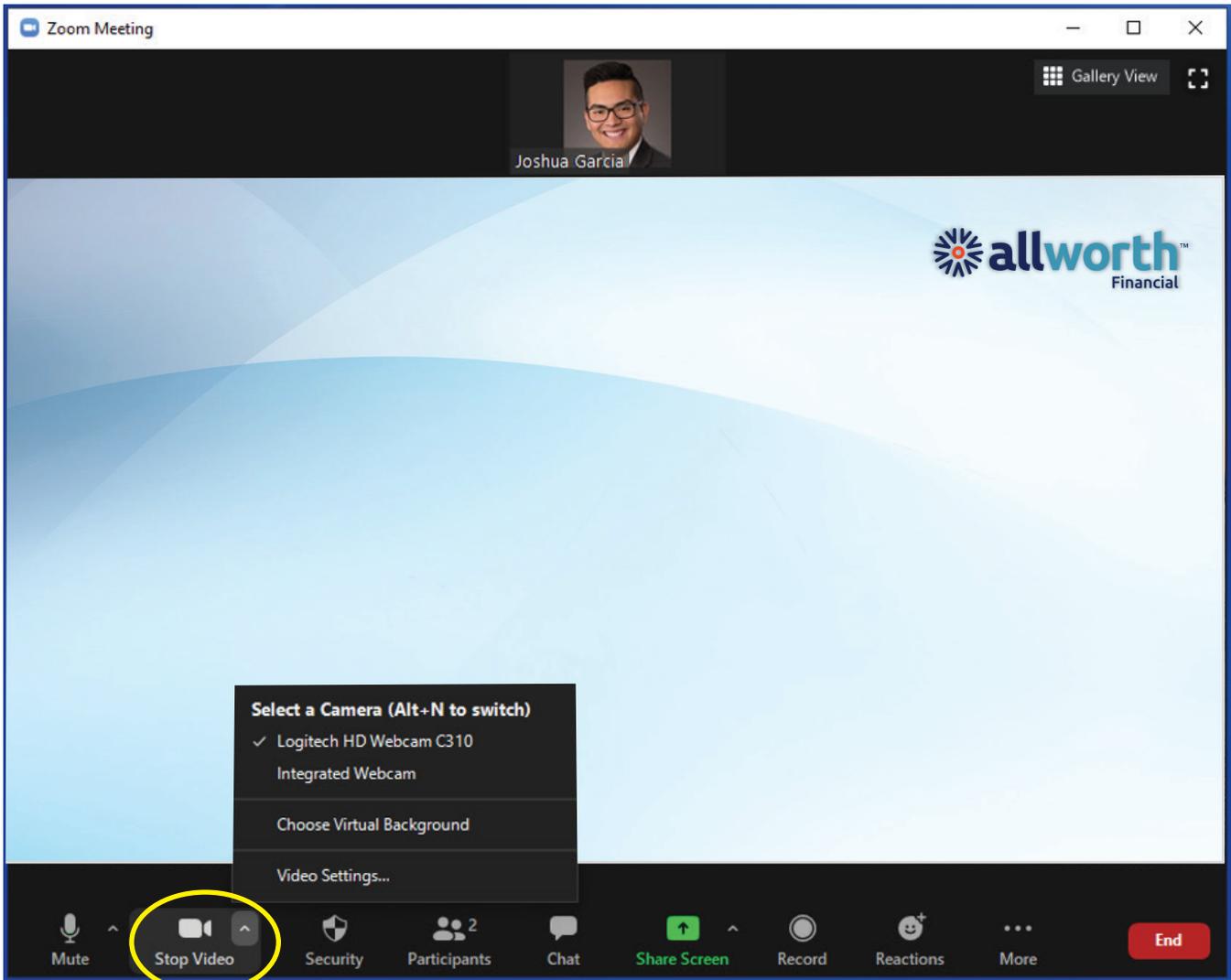


3. When the Chat box opens, you can type in messages here to your advisor.

4. Beside the “Mute/Unmute” button at the bottom left, there is a little arrow. If you click the arrow, as shown here, you can choose which microphone and speaker to use. This also allows you to go into your audio settings. When the microphone is picking up your voice, you will see green start to fill the microphone.



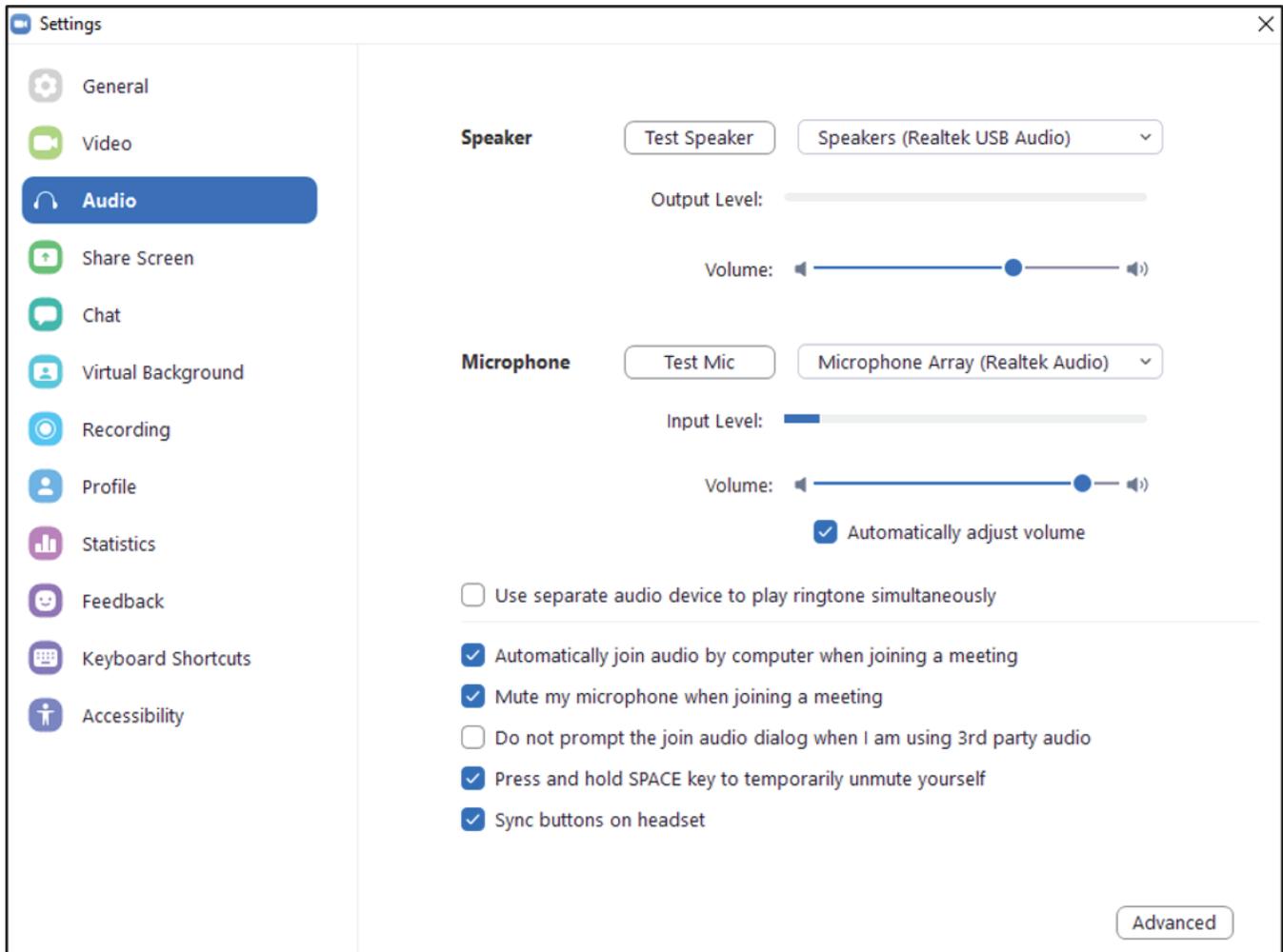
5. Beside the “Stop/Start Video” button at the bottom left, there is a little arrow. If you click the arrow, you can choose which camera to use. This also allows you to go into your video settings.



Have a good meeting!

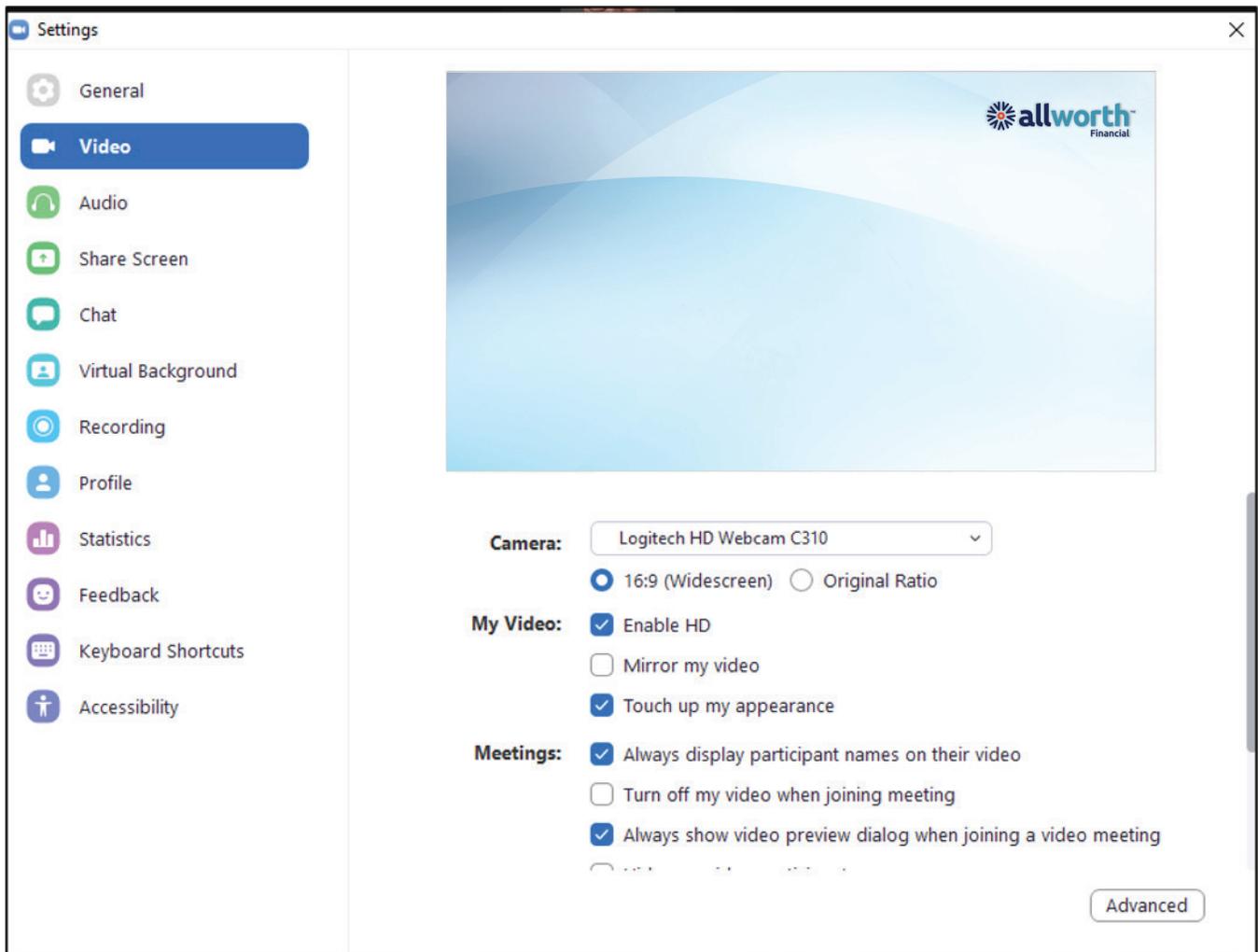
Advanced Audio Settings

To access your advanced audio settings, click the arrow beside your microphone icon and choose the option for “Audio Settings.” Here you can test your speakers and microphone, edit volume levels, and choose settings such as whether to automatically mute your microphone when joining a meeting.



Advanced Video Settings

To access your advanced video settings, click the arrow beside your video icon and choose the option for “Video Settings.” Here you can change your video preferences, such as whether to turn off your video when joining a meeting and whether you would like a video preview before joining.



(800) 482-2196

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