



BrokersFinancial
WEALTH MANAGEMENT

Doing Business Digitally During COVID-19

With many people being encouraged to stay home and work remotely because of COVID-19, meeting with clients face-to-face may become difficult for a while. The good news is you can still communicate and do business with prospects and clients digitally. What exactly can you do digitally? Let's break it down.

New Clients

If you've never met your client or prospect face-to-face, you can set up a video call with them for the initial meeting. Before, during, and after the video call, there are some guidelines you should follow:

- During the video call, have your client or prospect show you their government-issued ID to prove they are who they say they are (and that their ID picture matches their face).
- Afterwards, send them all of the sales materials that you went over in the video call, via email, fax or United States Postal Service.
- Complete paperwork by using eSign with American Funds, Perishing, and TD Ameritrade. We offer training on eSign and Docupace if you need it. On our website, log in and go to Practice Management, then click on Training, and then choose the right resource. You can also send paperwork via fax, email, or United States Postal Service.

Bottom line: Video calls can allow you to keep prospecting and supporting your client's needs.

Current Clients

Video calls are a great resource to use with your current clients, too. Now, and during other moments of market volatility, set up a digital call to offer reassurance and guidance specifically. You can also use digital calls to connect with clients on

annual reviews, follow-ups, milestones like birthdays and anniversaries, and even some Q&A. Let your clients know this is an option!

Zoom Meetings

To make video calls possible, you need the right tools in place. We recommend using [Zoom](#). Here's a few reasons why:

- It's FREE, with an option to record videos for \$14.99 a month
- Easy to host and create meetings from your computer, phone, or tablet
- Screen-sharing and live whiteboarding
- [Helpful training videos](#)

Of course, Zoom isn't the only option. FaceTime, Google Duo, Join.Me and GoToMeeting are other viable options that can help you stay connected, even if you can't meet in person.

Through all of this, we're still dedicated to providing you quality support and service to help you build your business. This is a challenging and uncertain time, but we're here to help you and get through it with you. Reach out to us at **877.886.1939** if there's something we can do to help you.