

Client Digital Capabilities: Step-By-Step Instructions

Cisco WebEx Meetings

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Use WebEx™ to meet with my Advisor (Desktop):

First time WebEx users will need extra time allotted for the “WebEx Download” component.

To test your access ahead of time:

1. Click <http://www.webex.com/test-meeting.html> to launch a test meeting
2. Enter your Name and E-mail Address, then click “Join”
3. If your test meeting loads successfully:

Congratulations!
Your system is now set up properly..

This is followed by a dialog box stating: “The host has not yet joined the meeting.”

4. Click “OK” to close the dialog box
5. At this point, you have joined successfully, and the WebEx Meeting Center client for the test meeting is successfully installed
6. Click on the “File” menu, and choose “Leave Meeting”

Launching the WebEx Meeting

1. Open your Advisor’s e-mail invitation
2. Click on the WebEx link, &
3. Click “Join Now”

Use WebEx™ to meet with my Advisor (Mobile):

From your iPad®, iPhone®, Android™

1. Open your Advisor’s e-mail and click on the link
2. If this is your first time using WebEx™, you’ll be directed to download and install the WebEx App
3. Tap “Install” and the application will download to your home screen
4. Go back to your Advisor’s e-mail and click on the link again, and a screen prompting you to enter your name will appear
5. Enter your name and tap “OK” and then enter your phone number and tap “Call This Number”

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Investment products:

6. Your phone number will be called and you will be entered into the meeting
7. Share your video by clicking the Video icon

Audio Options

- Use the **Call Me Feature** (Only available if a conference line is associated with the WebEx)
 1. Enter the phone number you want to be called at
 2. Click “Call Me”
 3. WebEx will call you into the WebEx Meeting
- Call into a Conference Line and manually enter a Participant Code (this information will be displayed once you sign into the WebEx)
- Call your Advisor directly – or- have your Advisor call you directly

Video Conference with your Advisor:

You can use a standard webcam or a built-in camera on your device

To install a standard webcam:

1. Plug the USB cord into your computer (most webcams will work with WebEx automatically when it’s connected to the computer or laptop. Some webcams might require software installation)
2. Place your webcam on top of your computer monitor

Once your Webcam is ready, click on the Video Camera Icon to share your video with your Advisor and meet face to face

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