



How To Have Better Virtual Calls

Timely Strategies & Best Practices



J William Chettle
Head of Client Experience
and Advisor Services

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Agenda

1. When to Meet Virtually
2. Getting Set Up
 - Lights
 - Audio
 - Background
3. Zoom vs Teams
4. Creating an Engaging Meeting

When to Meet Virtually

Communications Strategy

SYMMETRY[®]



12

touch points



4

conversations



1

meeting



1

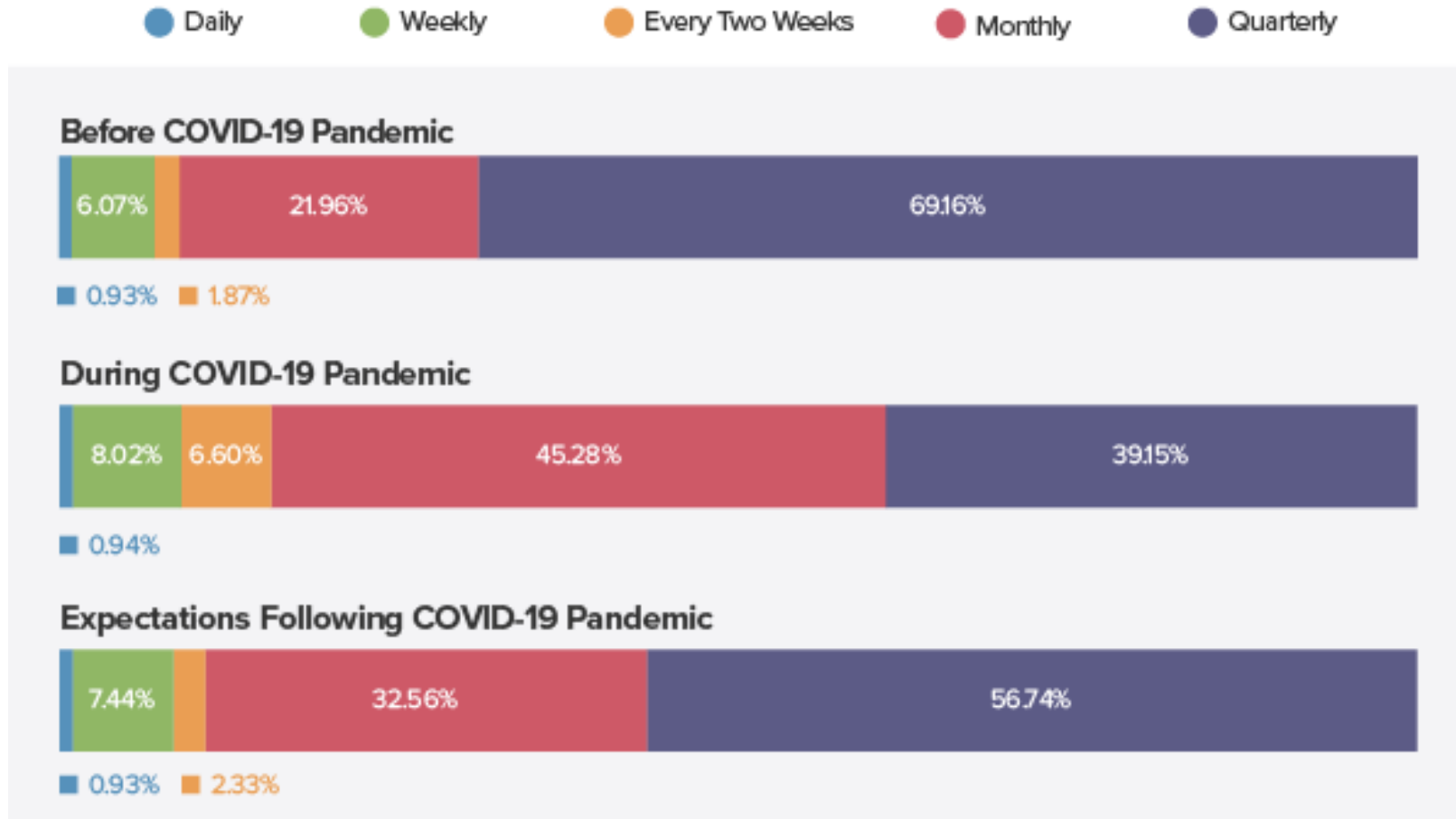
event
invitation

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When to Meet Virtually

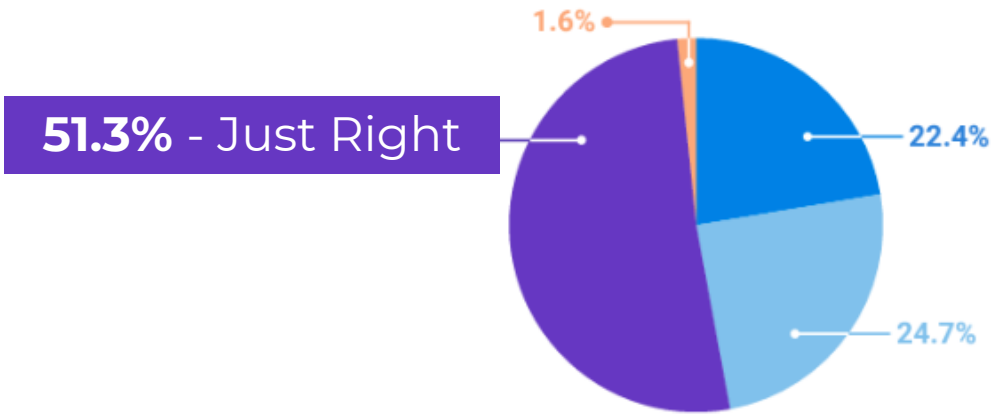
Communication Frequency – Client Expectations



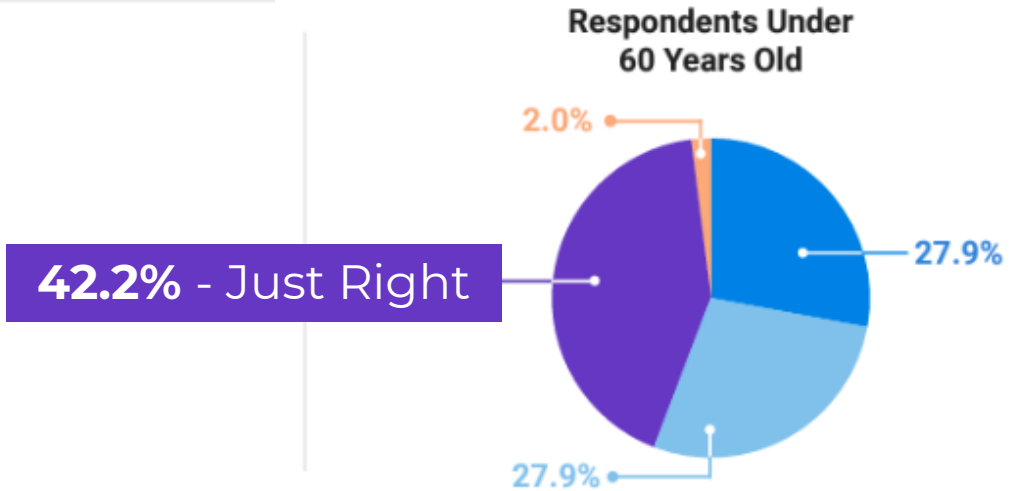
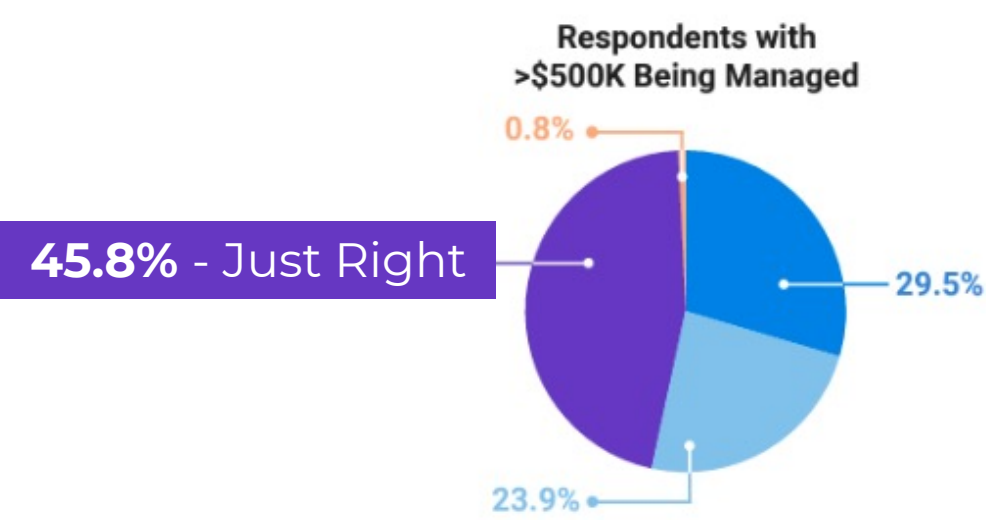
Source: SmartAsset Survey, March 2021

When to Meet Virtually

Communication Frequency – Client Preferences



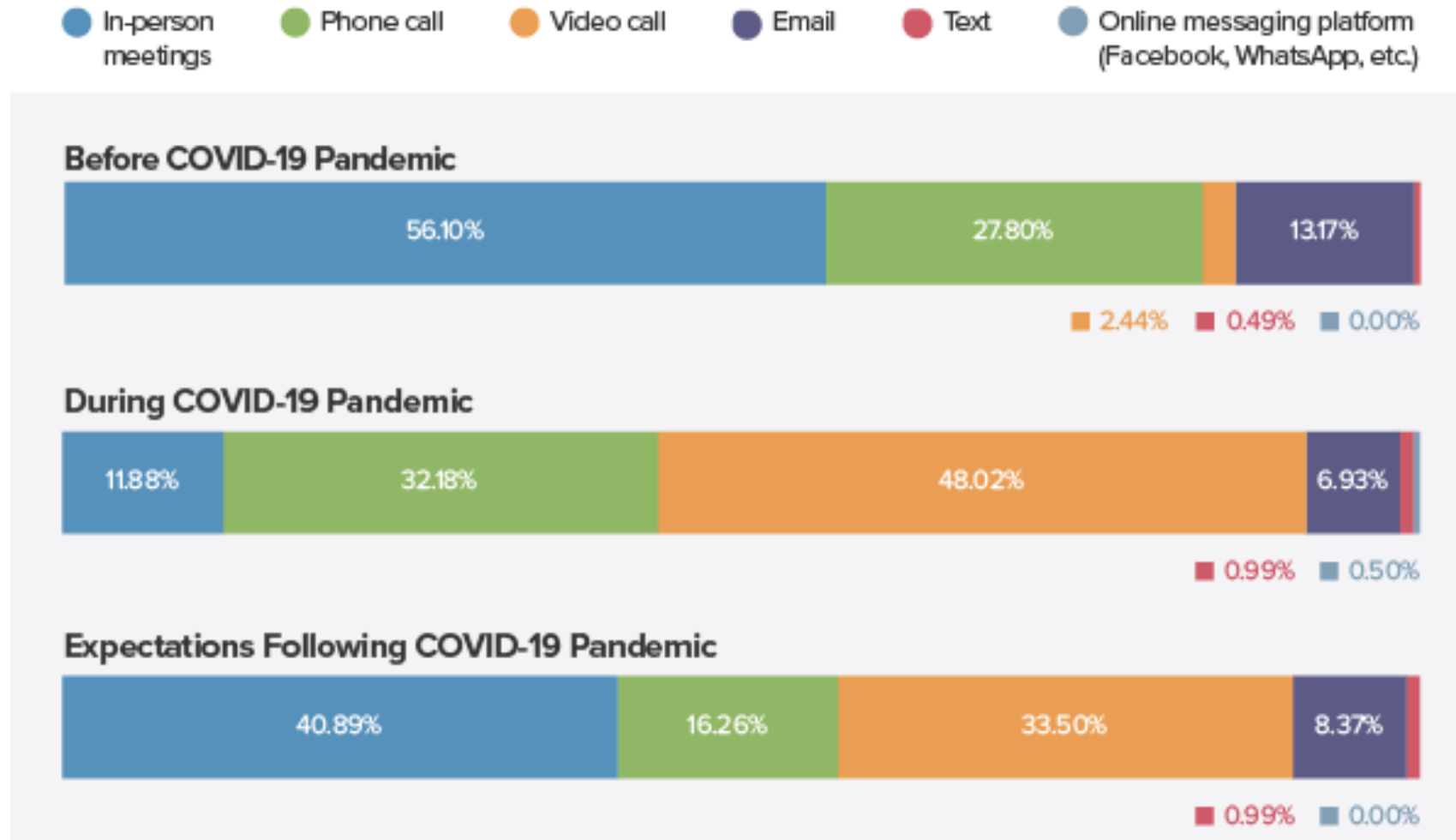
- I wish my advisor contacted me much more frequently
- I wish my advisor contacted me somewhat more frequently
- I am happy with the level of contact frequency from my advisor
- I wish my advisor would contact me less frequently



Source: "How Can Advisors Better Communicate with Clients?" Y Charts 2022

When to Meet Virtually

Financial Advisors' Preferred Communication Method

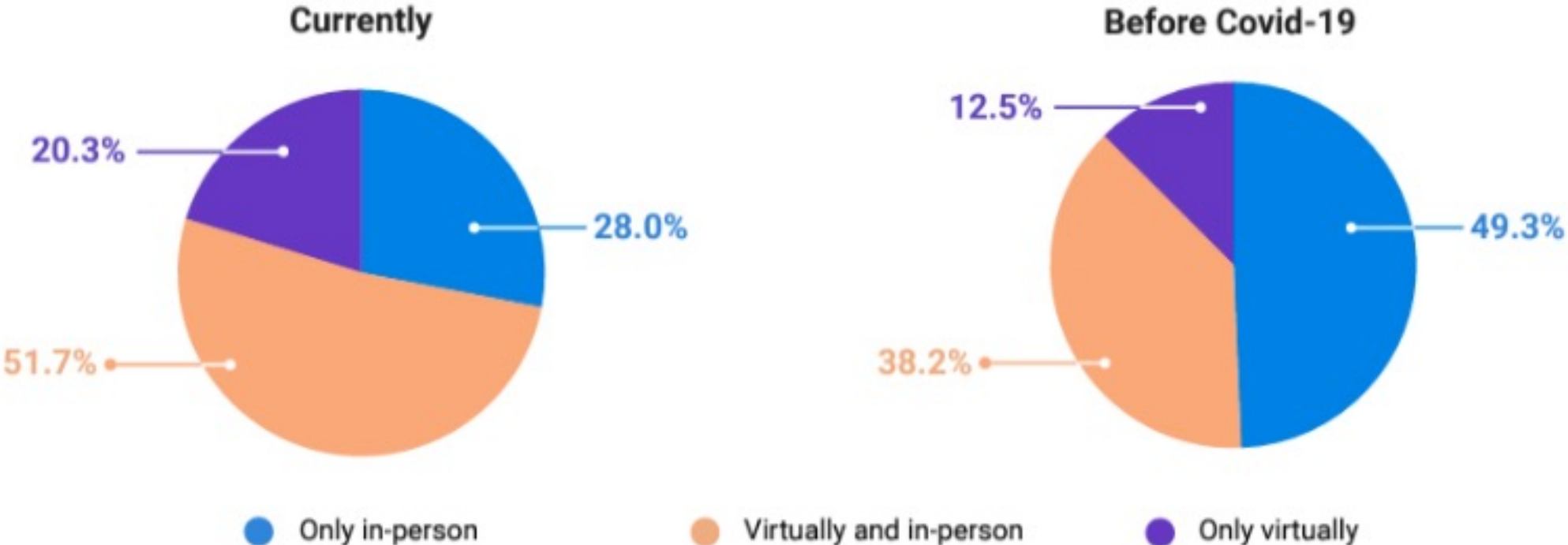


Source: SmartAsset Survey, March 2021

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When to Meet Virtually

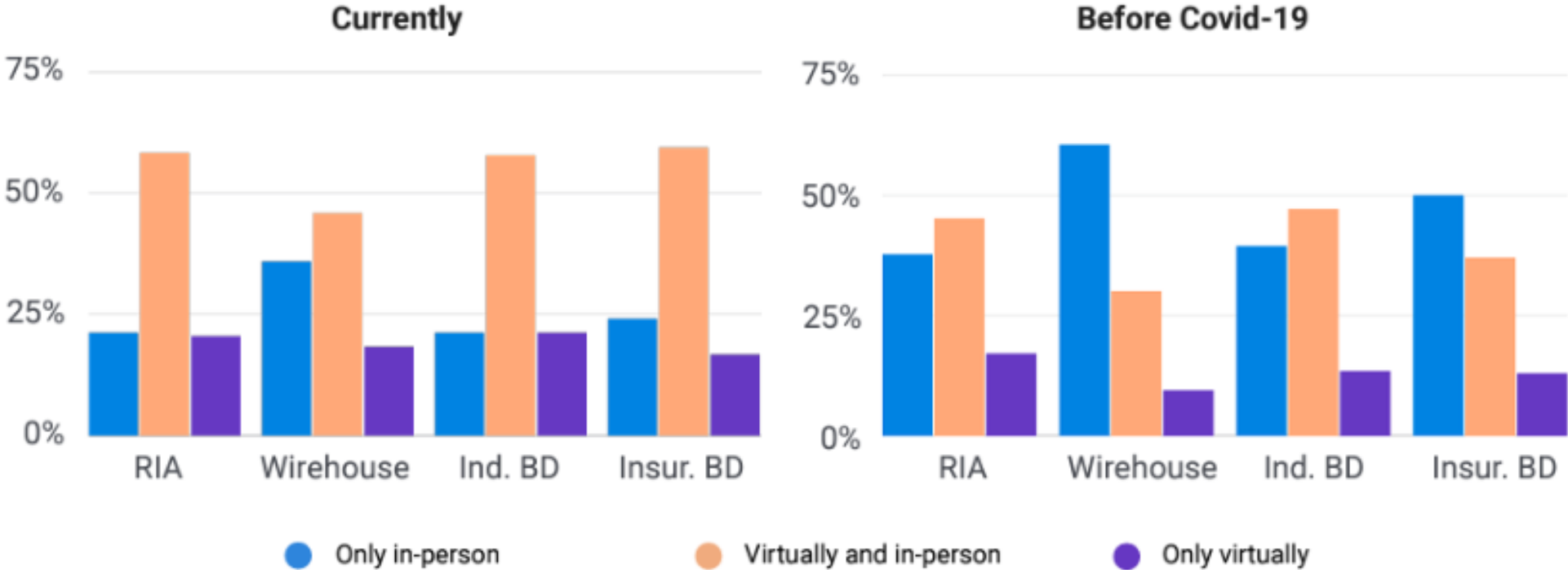
Clients Preferred Communication Method



Source: "How Can Advisors Better Communicate with Clients?" Y Charts 2022

When to Meet Virtually

How Clients Communicating w/ Advisors



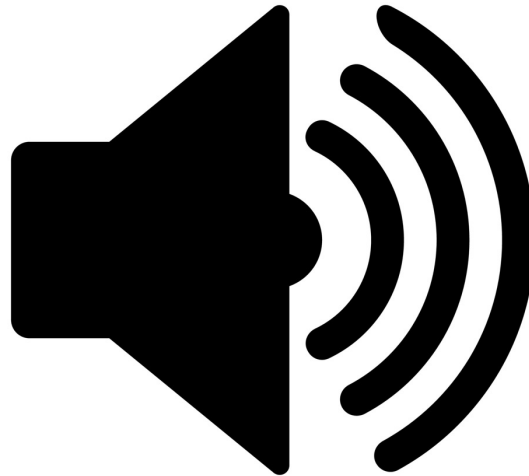
Source: "How Can Advisors Better Communicate with Clients?" Y Charts 2022

When to Meet Virtually

1. When Client Prefers
2. When Client is Remote
3. Quarterly Updates/Reviews (ideally one a year is in person)
4. Webinars

Getting Set Up

- Use Zoom/Teams noise reduction settings (Auto is generally fine)
- Your computer's internal mic is just **okay**
- Ideally, use an external microphone
- Consider using headphones/ear buds in noisy environments



Audio

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MAONO USB Lavalier Microphone, 192KHZ/24BIT Plug & Play

Electronics › Computers & Accessories › Computer Accessories & Peripherals › Audio & Video Accessories › Computer Microphones Spons



The image shows a black MAONO USB lavalier microphone with a lapel shirt collar clip. The microphone has a flexible boom and a USB-A connector. A coiled black cable is attached to the bottom of the microphone. To the left of the main image is a vertical strip of eight small thumbnail images, with the text '5 VIDEOS' below them.

MAONO USB Lavalier Microphone, 192KHZ/24BIT Plug & Play Omnidirectional Lapel Shirt Collar Clip on Mic for PC, Computer, Mac, Laptop, YouTube, Skype, Recording, Podcasting, Gaming, AU-UL10

Visit the [MAONO Store](#)

4.3  913 ratings | 51 answered questions

Amazon's Choice in Computer Microphones by MAONO

 Checking Prices...

\$22⁹⁹

 **prime** One-Day
FREE Returns 

Coupon: Apply 10% coupon [Shop items >](#) | [Terms](#)

Eligible for Return, Refund or Replacement within 30 days of receipt 

Color: **AU-UL10 USB Lavalier Microphone**

Delivery Pickup

\$22⁹⁹

 **prime** One-Day
FREE Returns 

 Deliver to William - Washington 20002

In Stock

Qty: 1 

Add to Cart

Buy Now

Payment [Secure transaction](#)

Ships from [Amazon](#)

Sold by [Nature shopping](#)


Returns [Eligible for Return,](#)

For illustrative purposes only. Source: Amazon.com. MAONO USB Lavalier Microphone, 192KHZ/24BIT Plug & Play. 2024.
URL: <https://www.amazon.com/Microphone-MAONO-Omnidirectional-Microphone-Recording-Broadcasting/dp/B074BLM973>

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ABSGEEGA Wireless USB Lavalier Lapel

Musical Instruments > Microphones & Accessories > Microphones > Wireless Microphones & Systems > Wireless Lavalier Microphones



ABSGEEGA Wireless USB Lavalier Lapel Microphone for iPhone& iPad& Android Phones Professional Video Recording Lav Mic for YouTube Interview Vlog Livestream & Podcast(NO APP or Bluetooth Needed)

Visit the [ABSGEEGA Store](#)
3.8 ★★★★★ 261 ratings | 23 answered questions

9 Price Changes

-9% \$24⁹⁹
Typical price: \$27.59 ⓘ

prime One-Day
FREE Returns

Exclusive Prime price

Coupon: Apply 10% coupon [Shop items >](#) | [Terms](#)

Eligible for Return, Refund or Replacement within 30 days of receipt

Brand: ABSGEEGA

Connectivity Technology: USB

Connector Type: USB

Special Feature:
Wireless usb microphone wireless lavalier microphone for android microphone for iphone wireless microphone for iphone bluetooth microphone for iphone

Roll over image to zoom in

Delivery Pickup

\$24⁹⁹
prime One-Day
FREE Returns

Deliver to William - Washington 20002

In Stock

Qty: 1

Add to Cart

Buy Now

Payment Secure transaction
Ships from Amazon
Sold by ABSGEEGA Store
Returns Eligible for Return, Refund or Replacement within 30 days of receipt

Add a gift receipt for easy returns


Add to List

For illustrative purposes only. Source: Amazon.com. ABSGEEGA Wireless USB Lavalier Lapel. 2024.
URL: <https://www.amazon.com/ABSGEEGA-Microphone-Professional-Recording-Livestream/dp/B0BJQPPFFB>

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Blue Yeti USB Mic

Musical Instruments › Microphones & Accessories › Microphones › Condenser Microphones › Multipurpose



LEGENDARY BLUE BROADCAST SOUND

Blue Yeti USB Mic for Recording & Streaming on PC and Mac, 3 Condenser Capsules, 4 Pickup Patterns, Headphone Output and Volume Control, Mic Gain Control, Adjustable Stand, Plug & Play - Silver

Visit the Blue Microphones Store

4.6 ★★★★★ 12,342 ratings | 758 answered questions

Climate Pledge Friendly

Save \$0.50

-18% \$106⁰⁰

List Price: ~~\$129.99~~

prime Same-Day
FREE Returns

or 3 monthly payments of \$35.34

May be available at a lower price from other sellers, potentially without free Prime shipping.

Extra Savings Prime Student Savings 1 Applicable Promotion

Eligible for Return, Refund or Replacement within 30 days of receipt | Free Amazon product support included

- Custom Three-Capsule Array: Produces Clear, Powerful, Broadcast-Quality Sound For Youtube, Game Streaming, Podcasting, Zoom Calls And Music.
- Blue Voice Software: Craft The Perfect Broadcast Vocal Sound And Entertain Your Audience With Enhanced Effects, Advanced Modulation And Hd Audio Samples. Advanced Blue Voice Is Compatible With Yeti, Yeti Nano And Yeti X. To Access Blue Voice

3 monthly payments: \$35.34/mo. (\$106.00 / 3 mo.)
prime Same-Day
FREE delivery: Today

One-time payment: \$106⁰⁰
prime Same-Day
FREE Returns

FREE delivery Today
2 PM - 6 PM. Order within 1 hr 20 mins

Deliver to William - Washington 20002

In Stock

Qty: 1

Add to Cart

Buy Now

Payment	Secure transaction
Ships from	Amazon.com
Sold by	Amazon.com
Returns	Eligible for Return, Refund or Replacement within 30 days of receipt
Support	Free Amazon product support included

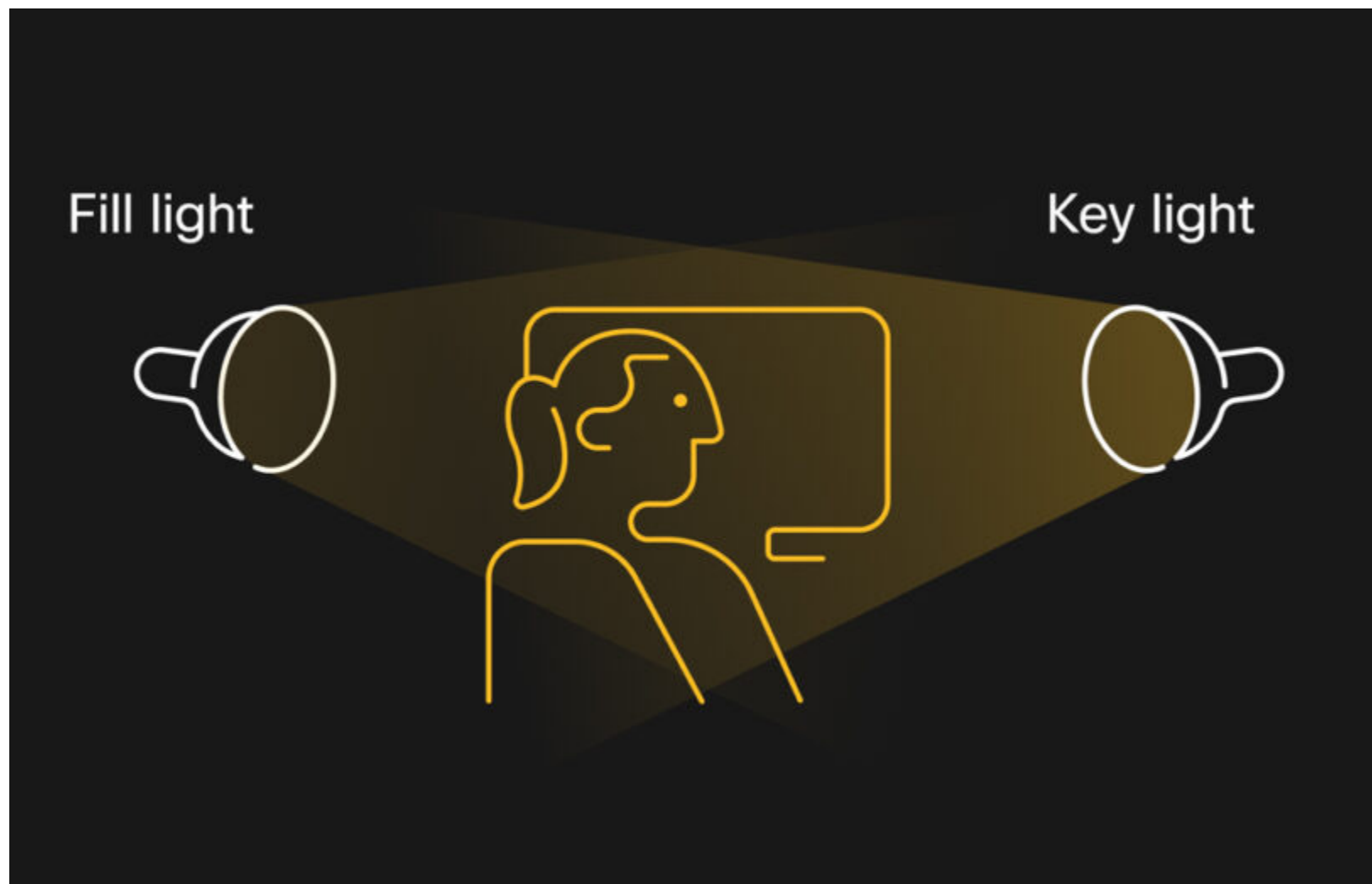
Roll over image to zoom in

For illustrative purposes only. Source: Amazon.com. Blue Yeti USB Mic. 2024.
URL: <https://www.amazon.com/gp/aw/d/B002VA464S/>

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Lighting

SYMMETRY[®]



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Lighting

SYMMETRY[®]

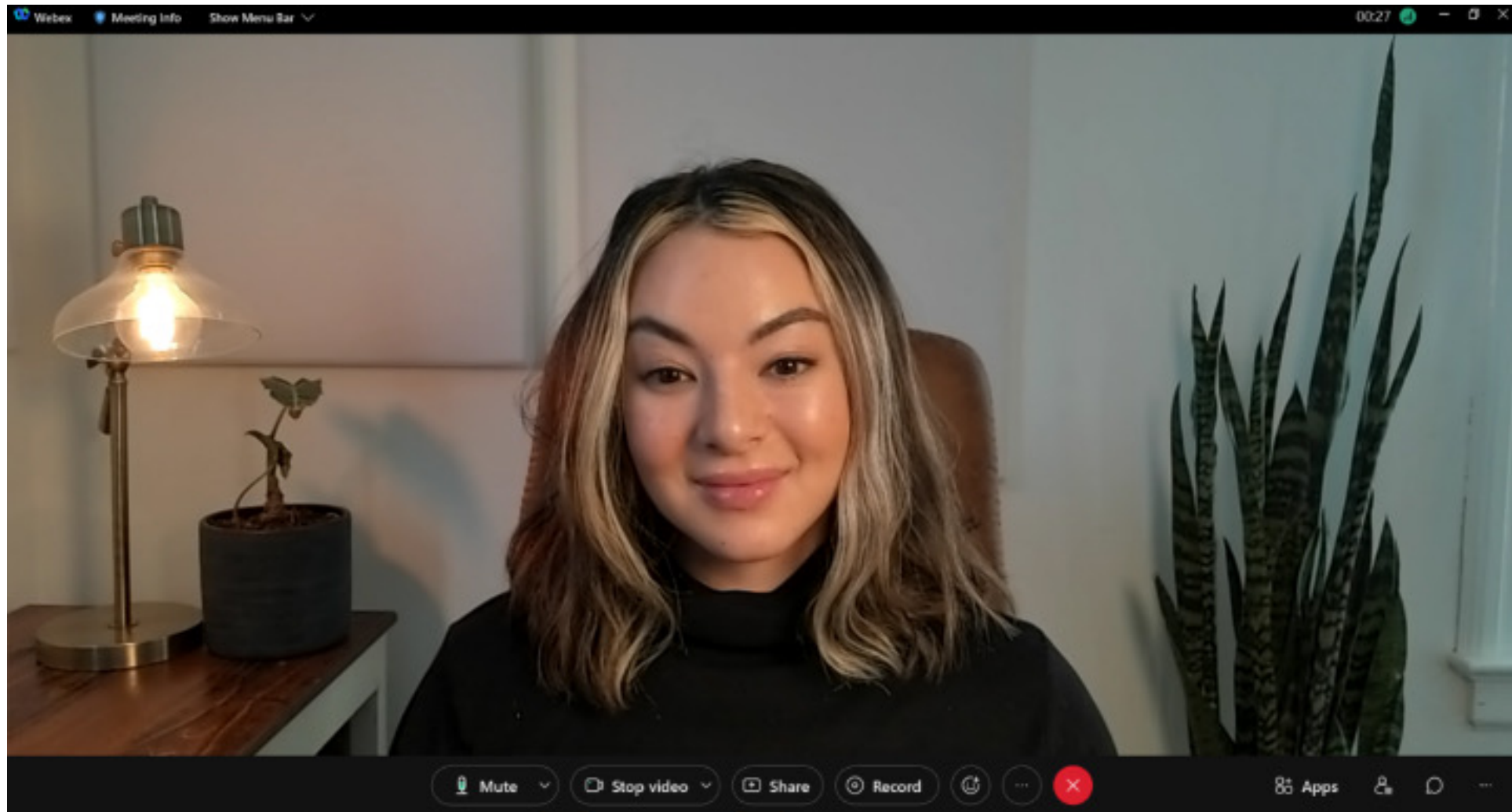


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Lighting

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Lighting

Be Wary of Backlight




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Lighting

SYMMETRY

Video Conference Lighting Kit 3200k-6500K



Roll over image to zoom in

Video Conference Lighting Kit 3200k-6500K Dimmable Led Ring Lights Clip on Laptop Monitor for Remote Working/Zoom Calls/Self Broadcasting/Live Streaming/YouTube Video/TikTok (Black)

Visit the selfila Store
4.3 ★★★★★ 6,438 ratings | 62 answered questions
Amazon's Choice for "ring light for computer"

Best Seller

-27% \$21⁹⁸
List Price: \$29.99

prime One-Day
FREE Returns

Coupon: Apply 10% coupon Shop items > | Terms

Get a **\$12 bonus** when you reload **\$100 or more** to your gift card balance (Restrictions apply).

May be available at a lower price from other sellers, potentially without free Prime shipping.

Color: **black**
Brand: Selfila
Connectivity Technology: 🏆 No.1 Ring Lights Clip
Hardware Interface: USB
Has Self-Timer: No

Delivery Pickup

\$21⁹⁸
prime One-Day
FREE Returns

Deliver to William - Washing
20002

In Stock

Qty: 1

Add to Cart

Buy Now

Payment Secure transaction
Ships from Amazon
Sold by SELFILA Technology
Returns Eligible for Return,
Refund or Replacement
within 30 days of receipt

Add a gift receipt for easy returns

Add to List

Add an Accessory:

Logitech C920x HD Pro

Recent price increase

For illustrative purposes only. Source: Amazon.com. Video Conference Lighting Kit 3200k-6500k Dimmable LED Ring Light. 2024.
URL: <https://www.amazon.com/Conference-Lighting-3200k-6500K-Broadcasting-Streaming/dp/B08LL2R32Q/>

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Elevate Your Computer

Looking slightly up at camera is more flattering than looking down at it



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Elevate Your Computer

SYMMETRY[®]

Eye level or looking slightly up at camera is more flattering



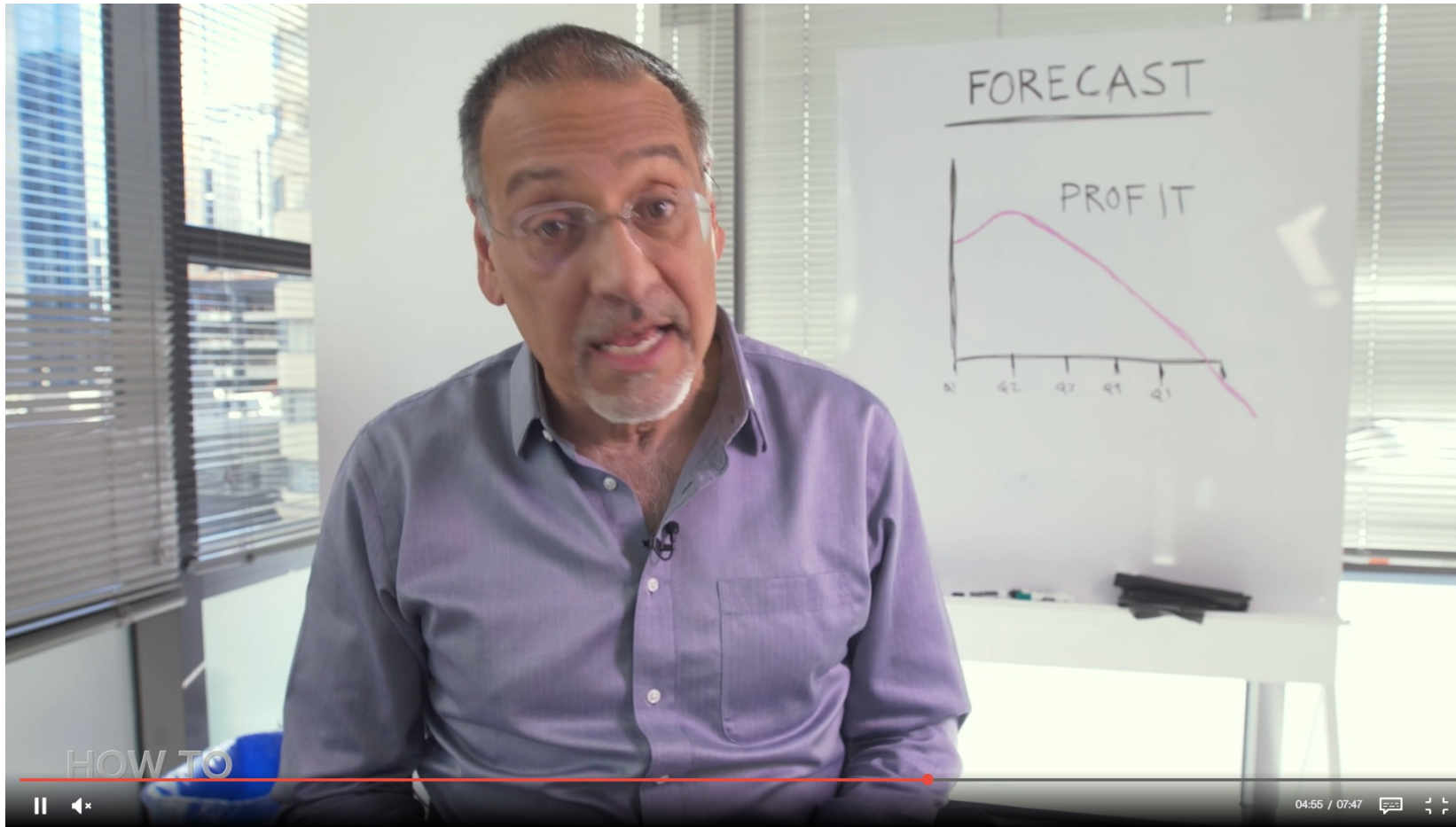
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Elevate Your Computer

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Eye level or looking slightly up at camera is more flattering



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Background

Avoid clutter!!!



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Consider Virtual Backgrounds

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Framing

- Sit 1.5 – 2 feet away from screen
- Position yourself in the center of the frame
- Frame from just below shoulders to just above your head leaving a few inches at top of frame



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Other Tips

- Rugs can help reduce room echo
- Avoid chairs that swivel (or at least not try to swivel)
- Don't have any doors in the frame
- Dress professionally
 - Avoid stripes
 - Avoid reflective or jangling jewelry
- Silence desktop notifications

Zoom vs. Teams

Zoom vs. Teams

	Zoom	Teams
Meeting collaboration and productivity features	★★★★☆ Screen sharing, remote control access, whiteboard and chat features	★★★★★ Extensive collaboration features, including robust chat, whiteboard, action item lists, and a Wiki
Customization	★★★★★ Advanced, including noise reduction and light adjustment depending on your environment	★★★★☆ Noise reduction available, but device settings are slightly less customizable
Ease of use	★★★★★ Easy to join from any device, even without an account	★★★★☆ App needed to join from mobile devices, but otherwise streamlined
Video quality	★★★★★ 1080p at 30fps; handles slow internet better	★★★★☆ 1080p at 30fps, but can slow down due to extra chat/collaboration features
Participant capacity	1,000 (on Enterprise package or with large meeting add-on), 300 otherwise	300 participants
Transcripts	Business plans only	Business plans only

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Zoom vs. Teams

- Teams has more advanced meeting collaboration features
- Zoom is better for external meetings; Teams is better for internal meetings
- Webinars: When it comes to webinars and large external meetings, Zoom's capabilities can be invaluable:
 - Breakout Rooms
 - Hand Raising
 - Polling

Creating an Engaging Meeting

Creating an Engaging Meeting

Best Practices

- Use **slides/screens** as necessary
 - But start and end meeting with just you on the screen
- Make sure you have everything you will show already prepared for **quick access**
- Use **whiteboard & other illustration features** to create more dynamic presentation
- Consider using **transcribe feature** (record w/ client permission)
- Use **smaller body language**, with fewer gestures
- **Listen vs. Talking** (though 43:57 rule might be difficult)

Devices, Participants & Invitations

- Know which device people are joining with
 - Suggest larger devices, such as iPads and laptops
 - Know where menu bars are and what options may not be available
- Ask clients to start video
 - Help them identify other menus
- Adding people
 - Invite/default email

Zoom

Client Meetings with Multiple Apella Team Members

- Set to “more than one person can share”
- Sharing windows versus screens
- Pausing Sharing
 - Editing a plan
 - Transitioning to a new document or program
- Whiteboards
 - Consider turning off camera
 - Templates are available
 - Making sure the client is following along
 - Saving

Zoom Screen Sharing



Creating Focus

Year	Age	Income Flows	Planned Distributions	Other Inflows	Total Inflows	Expenses	Planned Savings	Total Outflows	Net Cash Flow	Total Portfolio Assets
2023	58/57	\$190,000	\$0	\$47,958	\$237,958	\$202,258	\$35,700	\$237,958	\$0	\$5,241,114
2024	59/58	\$194,427	\$0	\$25,737	\$220,164	\$191,464	\$28,700	\$220,164	\$0	\$5,576,553
2025	60/59	\$198,957	\$0	\$0	\$198,957	\$169,757	\$29,200	\$198,957	\$0	\$5,931,542
2026	61/60	\$203,593	\$0	\$0	\$203,593	\$173,893	\$29,700	\$203,593	\$0	\$6,307,229
2027	62/61	\$208,337	\$0	\$0	\$208,337	\$178,137	\$30,200	\$208,337	\$0	\$6,704,820
2028	63/62	\$213,191	\$0	\$0	\$213,191	\$181,991	\$31,200	\$213,191	\$0	\$7,126,100
2029	64/63	\$218,158	\$0	\$0	\$218,158	\$186,458	\$31,700	\$218,158	\$0	\$7,571,952
2030	65/64	\$226,691	\$9,146	\$0	\$235,837	\$203,637	\$32,200	\$235,837	\$0	\$8,034,669
2031	66/65	\$212,654	\$19,206	\$0	\$231,860	\$205,951	\$27,000	\$232,951	(\$1,091)	\$8,506,665
2032	67/66	\$10,067	\$20,166	\$0	\$30,233	\$138,478	\$0	\$138,478	(\$108,245)	\$8,857,152
2033	68/67	\$23,697	\$8,725	\$0	\$32,422	\$142,026	\$0	\$142,026	(\$109,604)	\$9,243,489
2034	69/68	\$24,102	\$0	\$0	\$24,102	\$147,262	\$0	\$147,262	(\$123,160)	\$9,654,210
2035	70/69	\$24,515	\$0	\$0	\$24,515	\$149,418	\$0	\$149,418	(\$124,903)	\$10,086,562
2036	71/70	\$29,536	\$0	\$0	\$29,536	\$155,036	\$0	\$155,036	(\$125,500)	\$10,543,470
2037	72/71	\$81,670	\$0	\$0	\$81,670	\$171,019	\$0	\$171,019	(\$89,349)	\$11,063,118
2038	73/72	\$83,234	\$0	\$0	\$83,234	\$176,392	\$0	\$176,392	(\$93,158)	\$11,609,222
2039	74/73	\$84,830	\$0	\$0	\$84,830	\$181,984	\$0	\$181,984	(\$97,154)	\$12,183,144
2040	75/74	\$86,457	\$37,352	\$0	\$123,809	\$200,590	\$0	\$200,590	(\$76,781)	\$12,773,526
2041	76/75	\$88,117	\$270,124	\$0	\$358,241	\$358,241	\$0	\$358,241	\$0	\$13,242,318
2042	77/76	\$89,811	\$285,257	\$0	\$375,068	\$375,068	\$0	\$375,068	\$0	\$13,723,232
2043	78/77	\$91,538	\$300,284	\$0	\$391,822	\$391,822	\$0	\$391,822	\$0	\$14,217,082
2044	79/78	\$93,300	\$317,262	\$0	\$410,562	\$410,562	\$0	\$410,562	\$0	\$14,722,670
2045	80/79	\$95,098	\$335,172	\$0	\$430,270	\$430,270	\$0	\$430,270	\$0	\$15,239,744
2046	81/80	\$96,930	\$353,792	\$0	\$450,722	\$450,722	\$0	\$450,722	\$0	\$15,768,264
2047	82/81	\$98,799	\$372,044	\$0	\$470,843	\$470,843	\$0	\$470,843	\$0	\$16,309,261
2048	83/82	\$100,706	\$392,603	\$0	\$493,309	\$493,309	\$0	\$493,309	\$0	\$16,861,154
2049	84/83	\$102,651	\$412,586	\$0	\$515,237	\$515,237	\$0	\$515,237	\$0	\$17,424,291
2050	85/84	\$104,635	\$435,241	\$0	\$539,876	\$539,876	\$0	\$539,876	\$0	\$17,999,285
2051	86/85	\$106,659	\$456,595	\$0	\$563,254	\$563,254	\$0	\$563,254	\$0	\$18,585,443

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Zoom

Notes, Highlights, Stamps and Other Tools

The screenshot displays a Zoom meeting interface with a document titled "Net Worth Statement | As of April 3, 2024". The document is from PELLA, Advice for Life. The document content is as follows:

ASSETS	Maria	James	Joint	Total
NON-QUALIFIED ASSETS				
<i>Cash Alternatives</i>				
Digital Credit Union	—	—	\$50,000	\$50,000
Digital Credit Union CD	—	—	\$50,000	\$50,000
Flourish	—	—	\$699	\$699
Shrewsbury Credit Union	—	—	\$60,000	\$60,000
Shrewsbury Credit Union CD	—	—	\$36,000	\$36,000
<i>Taxable Investments</i>				
Schneider Electric Classic Offerings	—	\$48,969	—	\$48,969
Jim's Schwab Trust (The James S Sample Living Trust)	—	—	\$1,136,579	\$1,136,579
Maria's Schwab Trust (The Maria P. Sample Living Trust)	—	—	\$1,166,065	\$1,166,065
<i>Insurance Policies</i>				
Juvenile Life Insurance	—	—	—	—
Spousal Insurance	—	—	—	—
Work Life Insurance	—	—	—	—
Total Non-Qualified Assets	—	\$48,969	\$2,499,343	\$2,548,312
RETIREMENT ASSETS				
<i>Qualified Retirement</i>				
Jim's Schneider Electric 401(k)	—	\$1,594,050	—	\$1,594,050

LIABILITIES	Maria	James	Joint	Total
Total Liabilities	\$0	\$0	\$0	\$0

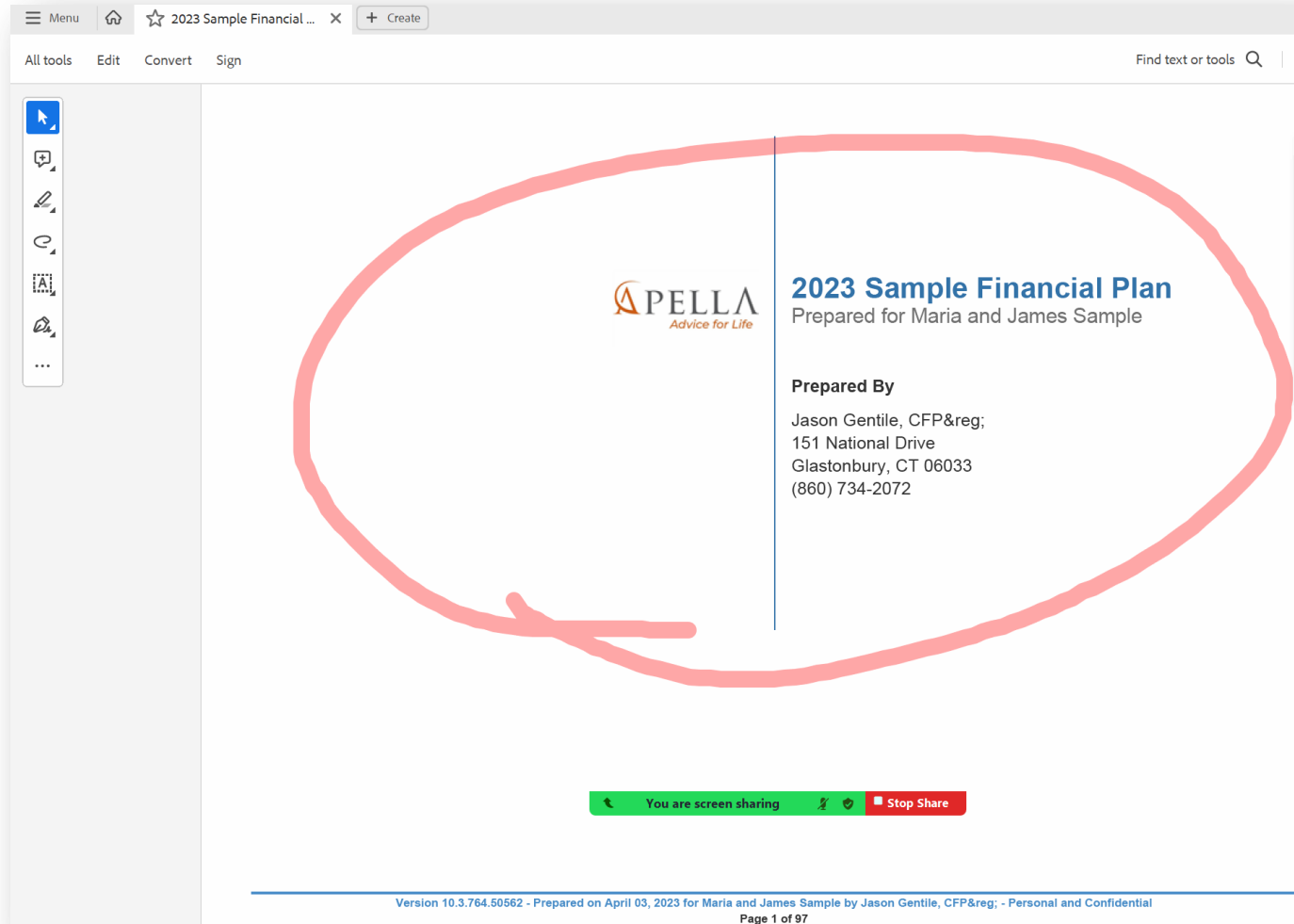
Total Net Worth	\$352,525	\$1,814,911	\$3,304,143	\$5,471,579
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Annotations on the document include a "New Liability - Need Statement" note, a "Talking:" bubble, and a "Share here?" bubble. A toolbar at the top includes icons for Mouse, Select, Text, Draw, Stamp, Spotlight, Eraser, Format, Undo, Redo, Clear, and Save. A status bar at the bottom shows "Version 10.3.764.50562", "You are screen sharing", "Stop Share", and "entile, CFP® - Personal and Confidential".

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Client Notes and Highlights



9 of every 10 clients
consider their advisors' communication
frequency & style when deciding to retain their
services, and when making referrals



Source: "How Can Advisors Better Communicate with Clients?" Y Charts 2022

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Thank You



“Scrappy,” the Symmetry bull is a symbol of our firm’s belief in the long-term power of markets.

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