

Remote Control

Tips to Help Keep Your Finger on the Play Button As Your Practice Goes Remote



User Manual

- Emotional & Physical Well Being
- Setting Up Your Home Office
- Presenting Virtually
- Advisor Perspectives
- Cybersecurity



Begin By Pressing Pause

Emotional & Physical Well Being



Maintaining your sanity and sense of routine

Stay informed, but not too informed

Take control in small ways

Maintain routines

Reach out to others

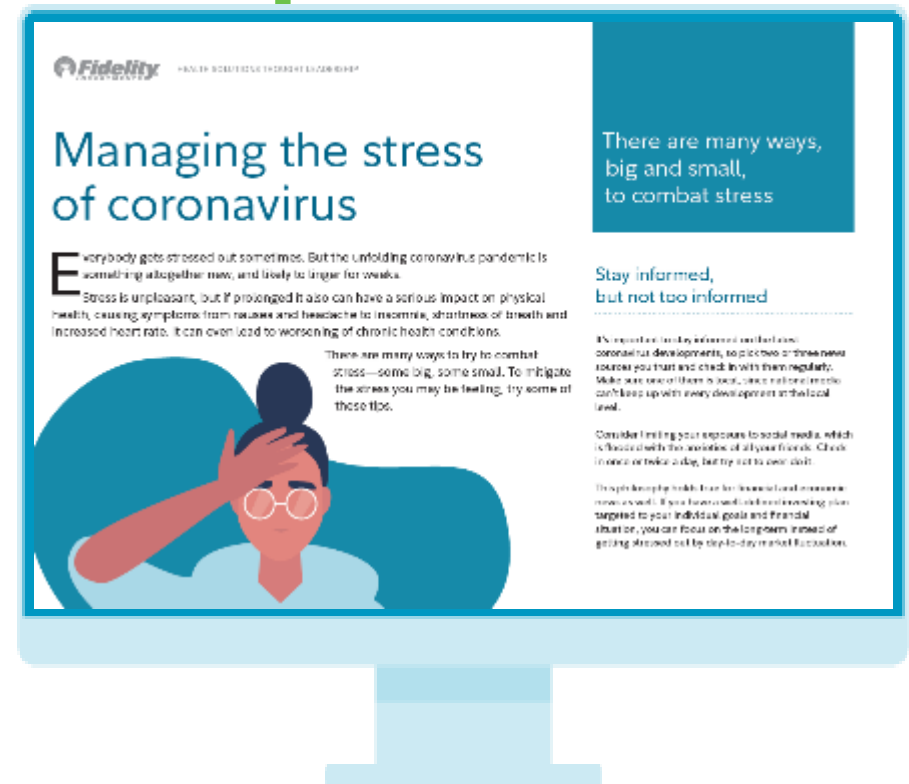
Lower your standards!

Remember to exercise and get fresh air

Be forgiving

Practice gratitude

Better days are ahead!



Batteries Not Included

Setting Up Your Home Office



Critical elements for virtual meetings



Get Connected

- If you can, connect your computer directly to the router with an Ethernet cable – a wired connection offers faster speeds and a more stable connection
- Place your router in the center of your house
- If using WIFI, chances are, there are numerous devices in your house that use the internet. Disconnect devices from the internet that you aren't using



Be aware

- Lighting & surroundings
- Use of virtual backgrounds & green screens
- Test Audio – Leverage a headset and Landline when possible; Avoid using PC mic only in all instances



Dress the Part

- Appearance – face, clothes, setting
- Movement, posture, eye contact, attention
- Attire: Trend towards business casual+



Choose your words

- Focus on your voice and words
- Enunciate and control your pace (slightly slower than 'live' presentations)



Press Play

Presenting Virtually



Virtual Meeting Planning

A man in a patterned shirt and glasses is looking at a laptop. Three circular callouts with blue borders and white backgrounds contain text. Two white arrows point from the top callout to the middle and bottom callouts. The background is a dark grey gradient with a faint image of a plant on the right.

- Send Invitations with links ahead of time
- ALWAYS do a dry run
- Prepare an agenda in short chunks

- Be deliberate and ready with your content
- Have materials up and running
- Join call early

- Understand your provider's muting options (including the ability to mute your participants prior to meeting entry)
- Confirm audibility
- Have a back-up plan

During the Virtual Meeting

Humanize the room



Create touchpoints – keep the meeting interesting by engaging relevant media throughout

Have a call leader to manage questions



Promote conversation by switching screen share to full video share (when appropriate)



Be aware of camera and non-verbals – your own and your clients'

Close out all other applications, they slow the connection



Display speaker notes on screen, just below camera to maintain eye contact

Encourage others to join via video but if some members are uncomfortable, provide a dial number as well

Get show recommendations

Advisor Perspectives



Don't share your streaming passwords

Cybersecurity



COVID-19 Cyber Threat Environment

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#COVID19 Drives
**Phishing
Emails
Up 667%¹**
in Under a Month

Working from Home Securely

Identify critical employees and business operations

Use VPN and Reliable, Secure Broadband Connection

Don't email work information to personal accounts

Use company-issued devices with DLP controls

Upgrade and patch all software (PC's and mobile)

Turn off systems at the end of each day

Save all work to company approved share drive

Practice privacy – quality headphones, go paperless

Protect your **passwords and accounts**

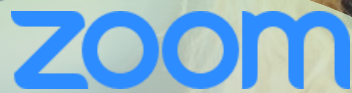
Protect your **business**

Protect your **computer**

Protect your **home office**

Protect your **video sessions**

Locking Down Zoom



zoom



Use Generated ID for all meetings

Require a meeting password

Lock meeting once all participants are present to avoid “Zoom bombing”

Disable remote control of your screen; control who can share their screen

Manage participants: mute/unmute, audio chime upon entry/exit, and more

Thank you



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