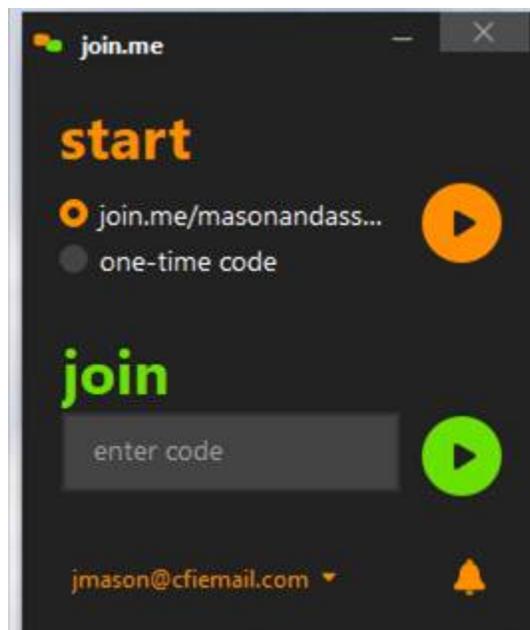


Mason & Associates uses join.me for video conference meetings. Please take a moment to prepare for your virtual meeting by taking the following steps:

1. Use the following link to install the application: <https://www.join.me/apps>. Installing the app in advance will give us the most dynamic and productive meeting. It enables us to have web cam functionality and the ability to share our screens to view documents.
2. Start your computer 30 minutes prior to the meeting to ensure any updates are installed before the meeting begins.
3. Open the application on your desktop.

Your Mason & Associates Financial Planner will call you on your preferred telephone number and provide you with a one –time access code to join the meeting.



4. Enter the access code in the box and click on the button to join the meeting
5. Although audio can be done through the application, we prefer to use telephone audio to ensure that our communication is not impacted by internet or join.me technical difficulties.
6. If you are unable to download the join.me application on your PC or Mobile Device please download and install the Google Chrome web browser. Google Chrome provides for similar functionality as the app.

Attached to your confirmation email is a copy of your [Strategic Planning Meeting Checklist](#). Please review the requested documents and use this [SECURE Sharefile Link](#) to upload them as soon as possible to ensure that your Advisor has the most up to date information available to prepare for your meeting. If you are unable to upload the documents in advance, please have PDF copies available or have the websites and log in information available to access the documents online. We can pass the presenter role to you which will enable you to share the documents on your screen. Please do not hesitate to call us at 757-223-9898 if you have any difficulty setting up your meeting.