



Thank you for choosing a Zoom meeting with Allworth Financial. Here are some tips to help you join and navigate your Zoom meeting. If you have any questions or have trouble joining, please don't hesitate to contact your advisor or give us a call at (800) 482-2196.

Join a Meeting

1. You will receive an email with a link to join a Zoom meeting.
2. When you click on the link, it will open your internet browser. You may download and run the Zoom application or join from your browser.
3. If you decide not to download Zoom, you can still join the meeting from your web browser.
 - a. Click on **"Join from your Browser"** as shown below.

[Support](#) [English](#) ▼

Click **Open Zoom Workplace app** on the dialog shown by your browser

If you don't see a dialog, click **Launch Meeting** below

By joining a meeting, you agree to our [Terms of Service](#) and [Privacy Statement](#)

Launch Meeting

Don't have the Zoom Workplace app installed? [Download Now](#)

Having issues with the Zoom Workplace app? [Join from your browser](#)

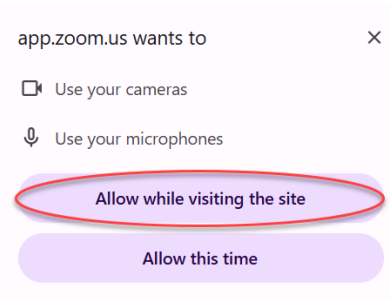
4. You may be prompted to give the web browser permission to use your microphone and camera if the settings have not been turned on before
 - a. Click on "Use microphone and camera" to allow them to be used on your computer in the web browser during the meeting

Do you want people to see you in the meeting?

You can still turn off your microphone and camera anytime in the meeting

Use microphone and camera

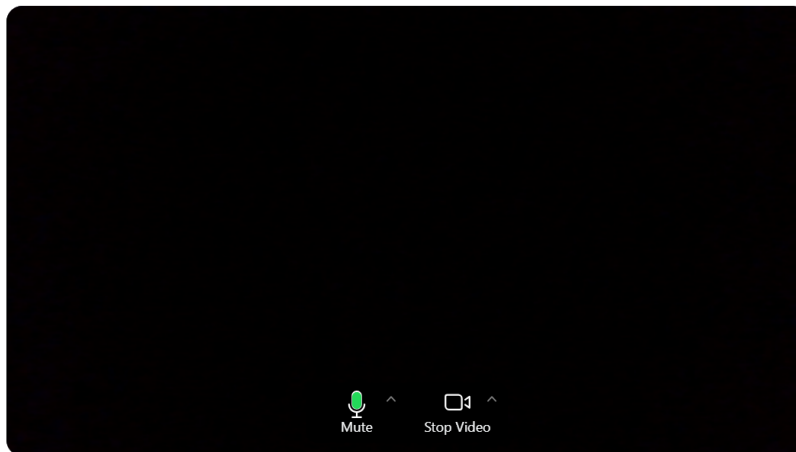
[Continue without microphone and camera](#)



b. Allow for all meetings

5. On the next screen, type in your name, then click on the “Join” button. This will take you to your meeting with your advisor.

[< Back](#)



Enter Meeting Info

Your Name

☐ Remember my name for future meetings

Join

By clicking "Join", you agree to our [Terms of Service](#) and [Privacy Statement](#).

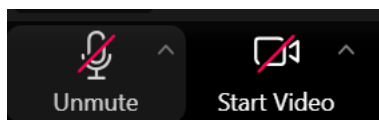
Zoom is protected by reCAPTCHA and their [Privacy Policy](#) and [Terms of Service](#) apply.

Start/Stop Audio and Video Settings (And Using Chat)

1. At the bottom left, when your cursor moves over the screen, you can click to start/stop your audio and video for the meeting.
 - a. When the microphone and camera are on, you will see green in the microphone, and the camera will appear without a diagonal line.

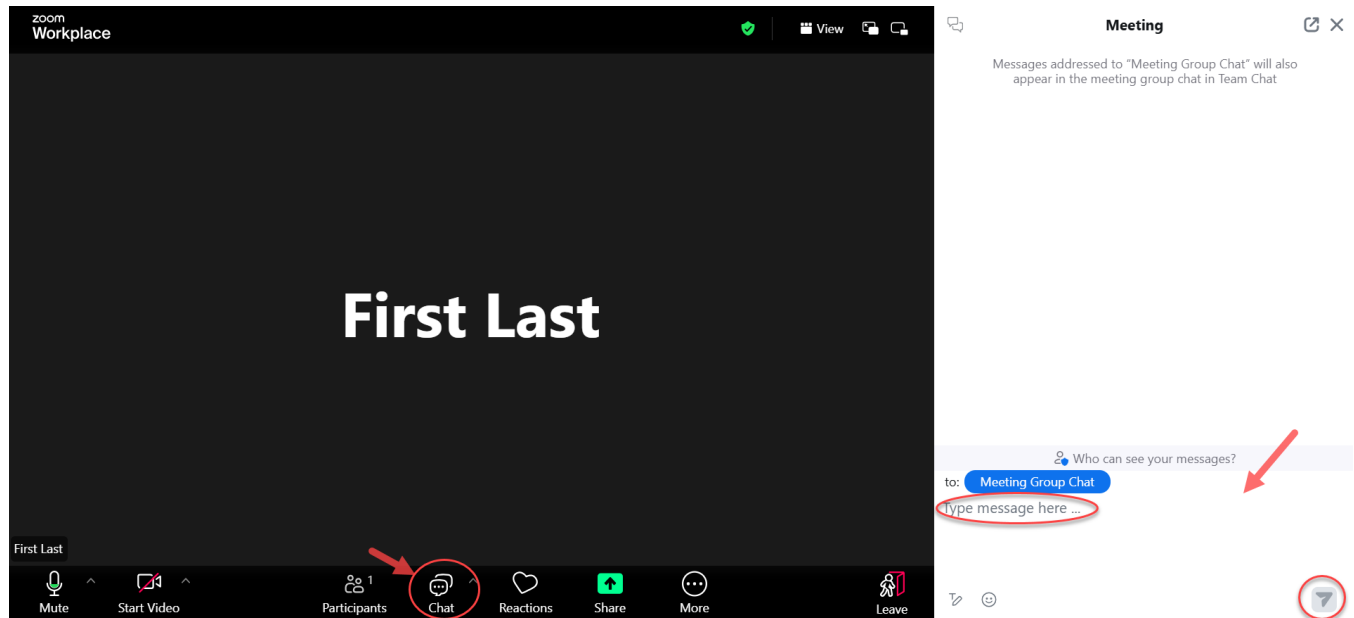


- b. When the microphone and camera are off, it will appear with a diagonal line across the icon

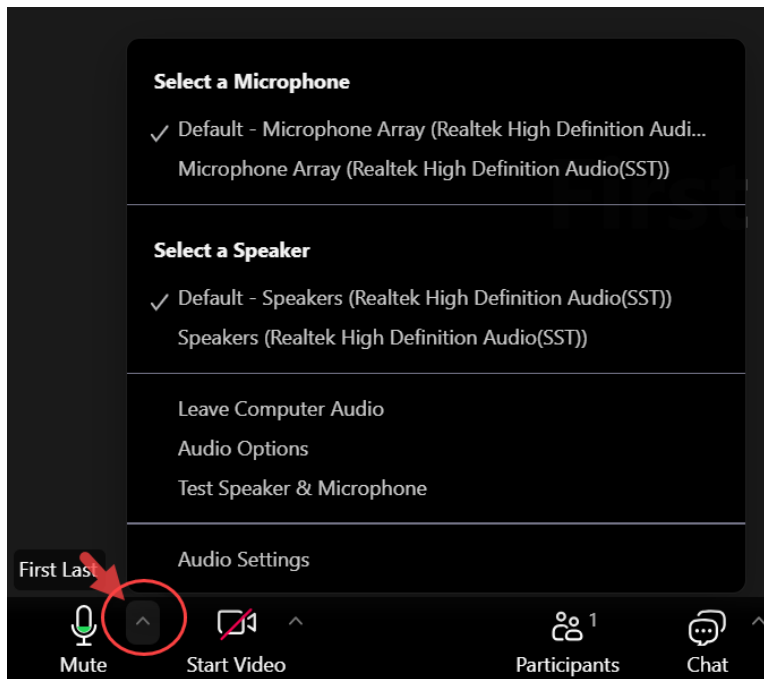


- c. To turn the microphone on and off, click on the icons

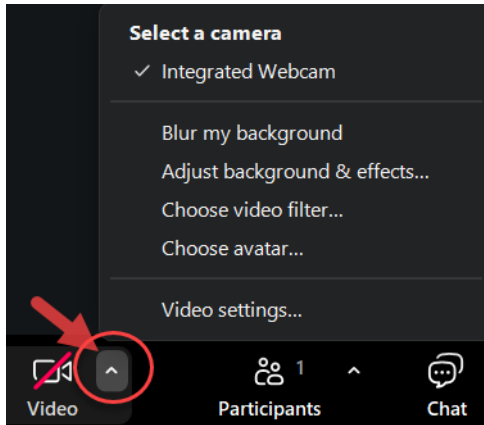
- We also recommend that you open the “Chat” button in the bottom middle of the screen. This will let you chat with your advisor, should you have any difficulties setting up the video and audio. *If you encounter any audio/visual technical difficulties, your advisor will call your phone to help walk you through the process.*



- When the Chat box opens, you can type in messages here to your advisor.
- Beside the “Mute/Unmute” button at the bottom left, there is a little arrow. If you click the arrow, as shown here, you can choose which microphone and speaker to use. This also allows you to go into your audio settings. When the microphone is picking up your voice, you will see green start to fill the microphone.



5. Beside the “Stop/Start Video” button at the bottom left, there is a little arrow. If you click the arrow, you can choose which camera to use. This also allows you to go into your video settings.



We look forward to our conversation.