

VIRTUAL 1:1 MEETING INVITATION

Focus on the Client, not the technology,
by preparing in advance

Dear <<Client>>,

I'm looking forward to our meeting on <<Date>> at <<Time>>. As we're not able to meet in person, we'll meet over video using <<Platform Name>>. Please give yourself a few minutes before the meeting to get set up.

INSTRUCTIONS: *[Update instructions for your platform & process]*

1. Access the platform (e.g., click the link, download software).
2. Make sure you're in a quiet, private space.
3. Turn on your video and microphone.
4. Mute your microphone when not speaking to eliminate background noise.
5. If we get disconnected... (e.g., join the meeting again, I will call you).

I've attached our meeting agenda. Please take a read through and let me know which topic you'd like to start with, or if there's something else you'd like to discuss.

Sincerely,

<<Advisor signature>>

For more ideas on how advisors can grow their business,
visit sunlife.ca/advisorbestpractices

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