

# How to: GoToMeeting with DBL

Because it is not always convenient for clients to visit us at our offices in Wilmslow, or to invite us to their property, DBL use a system called GoToMeeting to quickly and easily convene online meetings with our clients and connections.

## Features of GoToMeeting

- Meet with your financial adviser, wherever you are in the world, whenever is convenient.
- Use desktop, tablet or phone to 'GoToMeeting'.
- Allows us to share our screen with you (or you to share your own with us) so we can discuss reports, data or anything else.
- HD video. Audio via phone or straight through GoToMeeting using your microphone and speakers.
- A secure and highly convenient way to 'meet' online.

## How to GoToMeeting

GoToMeeting is extremely user-friendly. The following steps will see you meeting with your adviser in no time.

- 1 Arrange a convenient time for a GoToMeeting with your adviser.
- 2 Your adviser will invite you to a meeting which will contain a link to the online meeting.
- 3 Click the link to start your GoToMeeting. You can do this on your desktop, tablet or phone.
- 4 You may need to download a small file to your computer, or an app for your phone or tablet.
- 5 That is it! You are now taking part in your first GoToMeeting with your adviser!



**“ GoToMeeting enables us to meet our clients face to face wherever they are in the world. ”**



**a:** 14 Kennerley's Lane, Wilmslow, Cheshire, SK9 5EQ  
**t:** 01625 529 499 **e:** [enquiries@dbl-am.com](mailto:enquiries@dbl-am.com) **www.dbl-am.com**