

# Using Microsoft Teams for your Foresters Financial Adviser video appointment



## What is Microsoft Teams

Microsoft Teams is a secure communication tool, like Zoom or Google Meet, that allows you and your Foresters Financial Adviser to meet via a live online link. You do not need a Microsoft Teams account or any special software to join the meeting.

## What meeting confirmation will I receive?

Your Foresters Financial Adviser will send you an email confirming the date and time of your meeting.

The following attachments will be included with this email:

- A PDF file containing this guide.
- A file with the suffix ".ics". Open this file to add the appointment to your device calendar, if you wish.
- A PDF file "IDD-Financial Planning Brochure". Please take time to read this, it provides essential information about our products and services.

## What will I need?

- You will need a PC, Mac, laptop, smartphone or tablet which has a microphone and camera.
- As the meeting is online, your device will need to be connected to the internet. We recommend using the Google Chrome browser for the best experience.
- If you do not have the Teams app or do not want to download it to your device you will be able to join your meeting from your internet browser.
- You can download the Teams app from [App Store](#) | [Google Play](#) | [Windows Store](#)

## How do I join my meeting?

Just before your meeting is due to start, go to the confirmation email you were sent and click on the "Join Video Call" link.

Alternatively, if you have added the Teams meeting to your calendar, you can join from the calendar reminder.

Your Foresters Financial Adviser will know that you have joined and will start the meeting at the scheduled time.

The links are personal to your meeting – you will not need to enter a meeting ID or passcode.

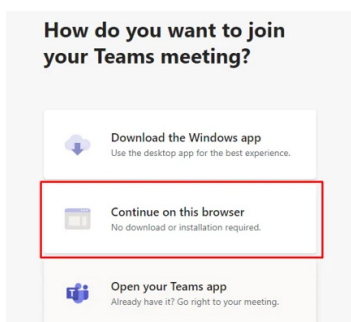


### Pre-meeting tips

- You can join the meeting early - take time to familiarise yourself with the Teams interface and check that your camera and microphone are working.
- Choose a quiet, well-lit, and comfortable spot.
- Have any documents you might need close by.
- The bigger your device screen, the better it will be to see any details your adviser shares with you.

## What joining options will I have?

If this is your first time using Teams, you may be asked how you want to join.



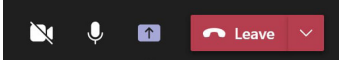
- If you don't have Teams installed on your device, simply join as a guest by selecting "Continue on this browser".
- If you have Teams installed, select the "Open your Teams app" option.
- If asked, please make sure your device camera and microphone are enabled.

## What happens at the start of my meeting?

Your Foresters' Financial Adviser will introduce themselves and provide their photo ID and business card details. They will confirm that your meeting will be audio recorded; this is an important element used for consumer protection and for monitoring the quality of Foresters' meetings.

Your Foresters Financial Adviser will also need to verify your identity and address, and you will be asked for sight of a suitable document at your meeting. Acceptable documents include a driving licence, a bank statement, a utility bill or a Council Tax bill. Please also have your National Insurance number to hand.

## What controls can I use during the meeting?



You can switch your camera and microphone on and off during the meeting by tapping or clicking the icons on your screen. Selecting the "Share" icon will allow you to show your adviser what you see on your device screen.

Selecting the red "Leave" button will end your meeting.

## What if I need help?

If you have any questions before your meeting, please reach out to your Foresters Financial Adviser – their contact details are on the meeting invitation email or you can contact us on your MyPlans account by raising a query.

If you have any vulnerabilities or additional needs, please let us know. We will always do our best to accommodate any specific requirements you may have. You are welcome to be supported by a relative, friend, or other trusted person at your meeting. Please let us know in advance so we can include your chosen person.

If you need to re-arrange your meeting, please let your adviser know or use the "Reschedule" link on your meeting invitation email. We want your video meetings to be safe and confidential. For this reason, we recommend joining your meeting from your home or another private location. If you can't be at home, please let your Foresters Financial Adviser know beforehand so we can make sure your privacy is protected.