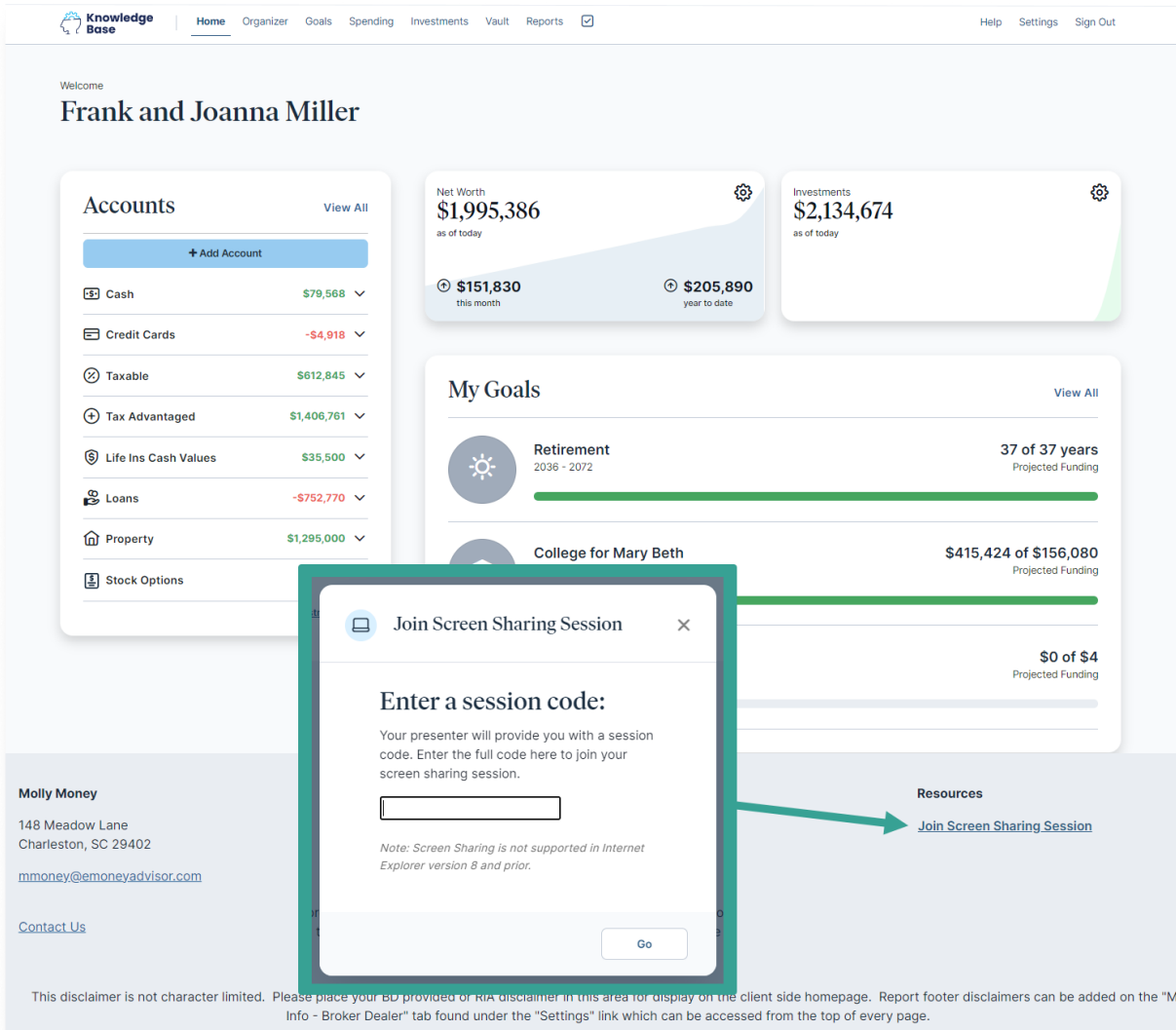


This User Guide details how to join a Screen Sharing Session with your Advisor.

Collaboration is essential to the planning process but meeting in person may not always be possible. With our state-of-the-art and interactive screen sharing capability available through your Personal Financial website, you'll have the flexibility to connect with us wherever you are.

1. Click the Join Screen Sharing Session link at the bottom of your page.



2. Enter the session code we provide you with at the start of the meeting.

3. View your Advisor's screen and have the ability to be the presenter.