## **Screen Sharing**

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.

Accounts	View All	Net Worth \$1,995,386	¢	Investments \$2,134,674	¢
+ Add Acco	punt	as of today		as of today	
🖅 Cash	\$79,568 🗸	\$151,830 this month			
E Credit Cards	-\$4,918 🗸		,		
Taxable	\$612,845 🗸	My Goals			View All
+ Tax Advantaged	\$1,406,761 🗸				VIEW AII
S Life Ins Cash Values	\$35,500 🗸	-0- Retireme	nt		37 of 37 years Projected Funding
🕲 Loans	-\$752,770 🗸				
Property	\$1,295,000 🗸	College f	or Mary Beth	\$415	5,424 of \$156,080
Stock Options					Projected Funding
	tr 🔲	Join Screen Sharing Sess	ion ×		
					\$0 of \$4 Projected Funding
		inter a session code			
	co	our presenter will provide you with de. Enter the full code here to join			
loney	sc	reen sharing session.		Resource	es
adow Lane		ote: Screen Sharing is not supported i	alataraat	Join Scre	en Sharing Session
ston, SC 29402					

- 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.