

Instructions for Accessing the Virtual It's Your Money/Estate Webinar through Zoom



STEP ONE: Registering for one or both webinar series

Congratulations you have now registered for the It's Your Money or It's Your Estate series or perhaps both series. You have received this confirmation to show that you were successful in registering.

The day before each session you will receive a reminder email about the session. You will also receive another reminder one hour before the session. Both reminders will have the link to the meeting. Each week this reminder process repeats so you don't need to keep track of these links.

STEP TWO: Downloading the Zoom App

You will have to decide if you are going to download Zoom onto your smartphone or tablet, or if you will download Zoom on your laptop or desktop. If you have a smart phone or tablet, we highly recommend you utilize this option. **These steps will take several (many) minutes!**

Option 1: From a tablet or smartphone (simplest and recommended)

1. Find and Download the Zoom Application to your phone
 - a. On Apple products, you will do this from the App Store.
 - b. On Android or other products, you will download apps from, Google Play.

The icon for the app should look like this:



2. Confirm the app has downloaded
 - If you open the app before the workshop, the app will ask for permission to utilize your microphone and camera. Allow the application access to both.

- *Zoom* will only access your microphone and camera when you are actively in a *Zoom* meeting and give it permission to do so.

3. You are done! The application has been installed on your device. When it's time for the workshop, you simply click on the link in your email or type that link into the browser, and the app will launch.

Option 2: From your laptop or desktop computer

1. In your browser, go to <https://zoom.us/download>
2. As seen in the image below, click on "Download" under the option for "Zoom Client for Meetings"

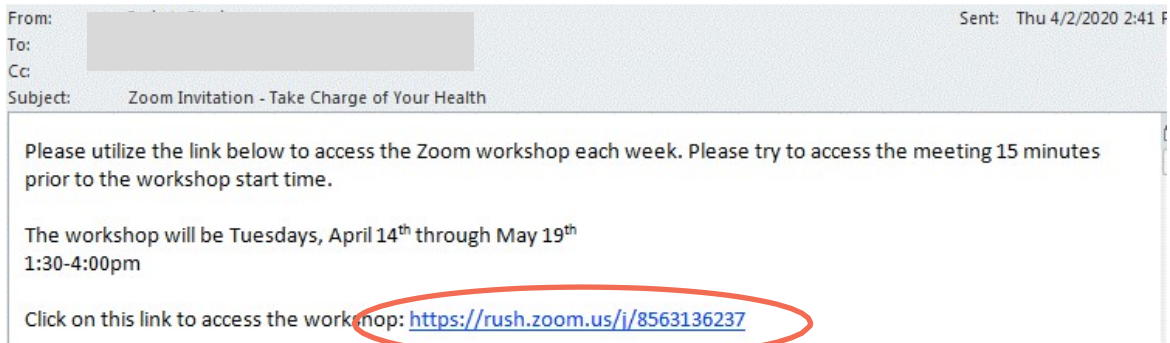
The screenshot shows the Zoom website's Download Center. At the top, there is a navigation bar with links for SOLUTIONS, PLANS & PRICING, CONTACT SALES, SCHEDULE A MEETING, JOIN A MEETING, and HOST A MEETING. Below the navigation bar is a light green banner with the text: "We have developed resources to help you through this challenging time. [Click here to learn more.](#)" The main content area is titled "Download Center" and features a blue button labeled "Download" for the "Zoom Client for Meetings". The version number "Version 4.6.9 (19253.0401)" is displayed next to the button. Below this, there is a section for "Zoom Plugin for Microsoft Outlook" with a description: "The Zoom Plugin for Outlook installs a button on the Microsoft Outlook tool bar to enable you to start or schedule a meeting with one-click." A blue "Help" button is visible in the bottom right corner of the screenshot.

3. Clicking this link will prompt your browser to download the software to install the *Zoom* app onto your computer. This looks different on Mac or PC computers. Follow the prompts and finish installing *Zoom* onto your desktop.

STEP THREE: Joining the Virtual Workshop

Option 1: From your tablet or smartphone

1. From your invitation email, tap the link to access the workshop.



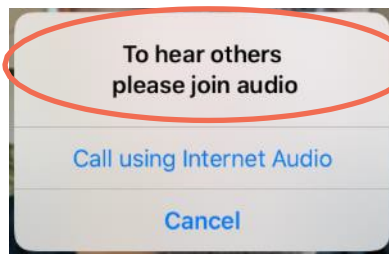
2. If you already have the *Zoom* app installed on your device, the meeting will launch automatically.

Video Preview

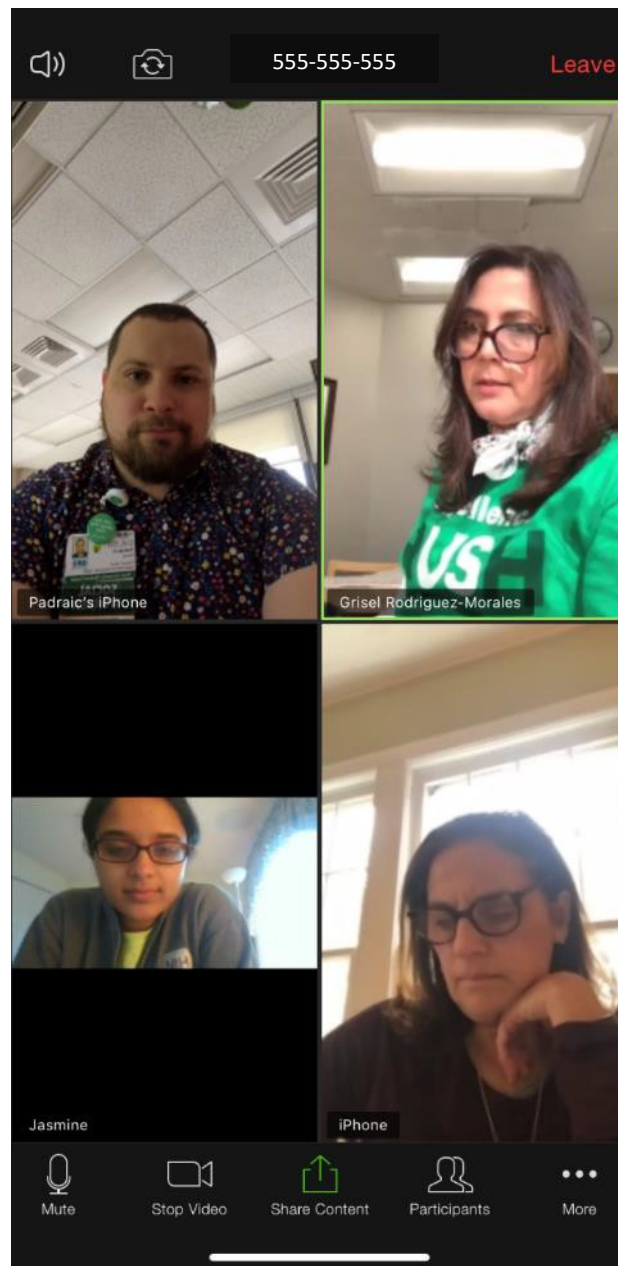


3. Once the app loads, your camera will turn on and you will see the “Video Preview” (see to left). Don’t worry, at this point no one can see your video, only you! If your video does not show up, it’s because you have not given the Zoom app the permission to use your camera. The app may prompt you to change that. Once your video is showing up on your screen, tap “Join with Video” (see photo).

4. After you tap “Join with Video,” you will be prompted to turn on your audio with a prompt that says “To hear others, please join audio.”

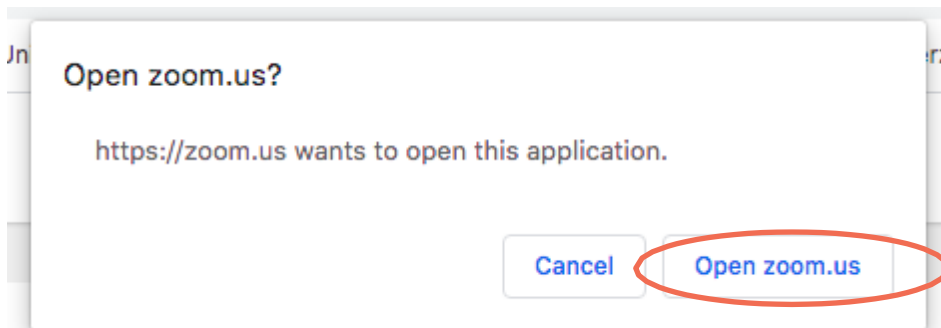


5. On your tablet or mobile device, you will typically only have two options: “Call Using Internet Audio” or “Cancel”—tap “Call Using Internet Audio”. This option will utilize the speaker and microphone on your smartphone or tablet.
6. Congratulations! You are in the workshop! You should be able to see and hear other participants, and other participants should hear you. For more information, read “Controls During the Workshop.” The screen should look similar to this photo:



Option 2: From your laptop or desktop computer

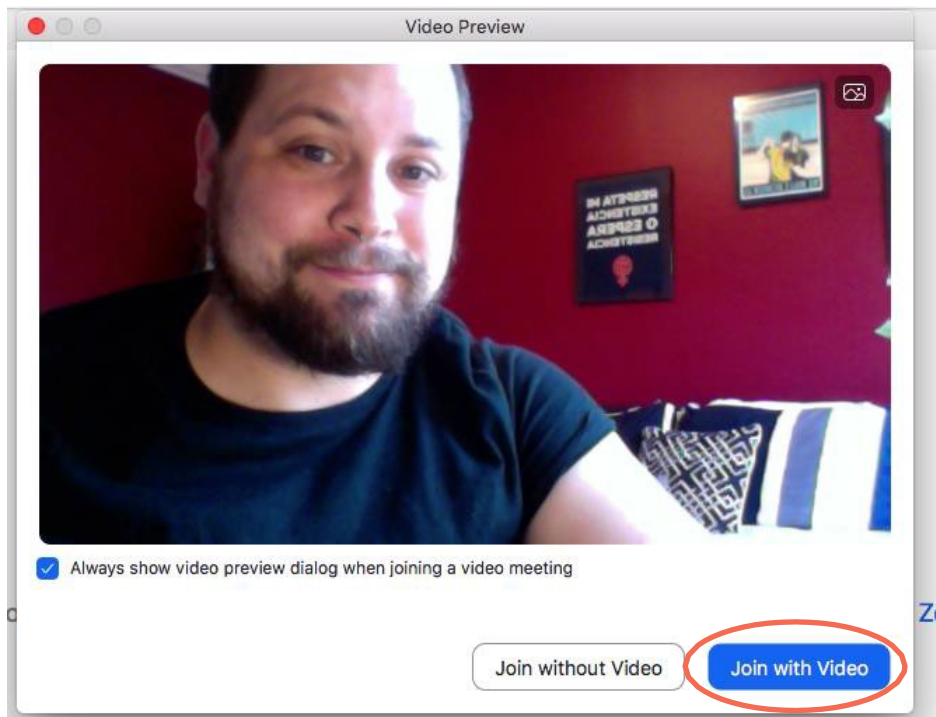
1. From your invitation email, click the link to access the workshop.
2. Clicking this link will open up another screen. On this screen, if you have properly installed the Zoom app to your computer, you will see the following message (see below).
3. Click “Open zoom.us”



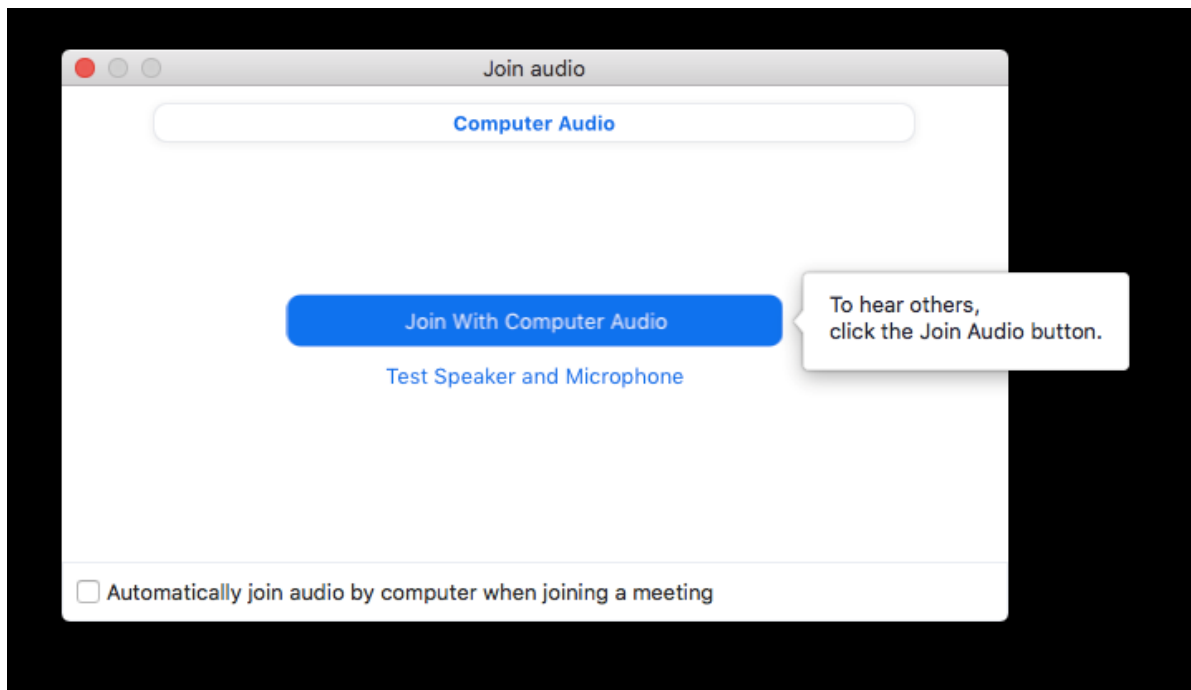
4. The Zoom app should launch and you will see the message below asking for your name. Type in your name and click “Join”



5. Once you click join, a screen will pop up titled “Video Preview” and your webcam (if you have one) will turn on. At this point, no one else can see your video, only you! Click “Join with Video.”



6. You will then need to turn on your audio. Most computers will only prompt you to use your computer audio. First, try testing your speaker and microphone by clicking “Test Speaker and Microphone” and follow the prompts.

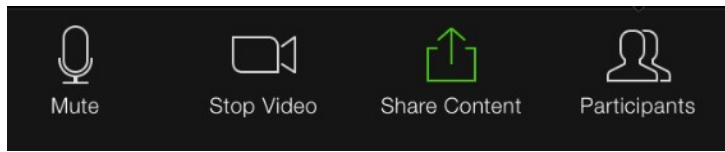


7. You should now be able to see and hear all the other participants who have logged on already.

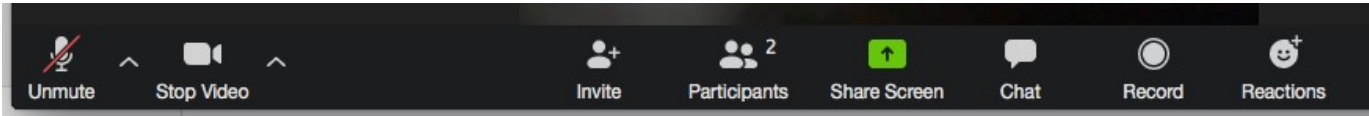



STEP FOUR: Controls During the Workshop

Here are the different controls you should know about to participate in the workshop once you are in:



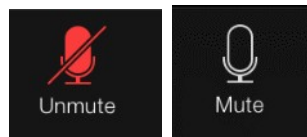
On Mobile Devices or Tablets



On laptop or desktop 

Mute & Unmute: This function is incredibly important. All participants will be muted by the facilitators. However, you can unmute yourself to talk. You can toggle between muting and unmuting by clicking or tapping the mute symbol on the bottom of your screen.

On Tablets or Mobile Devices:



On Laptop/Desktop:



Stop Video: We want to encourage everyone to utilize their video function if at all possible; however, if for some reason you need to turn off your video, you can turn your camera on and off clicking or tapping the camera symbol.

On Tablets or Mobile Devices:

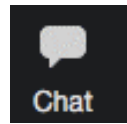


On Laptop/Desktop:

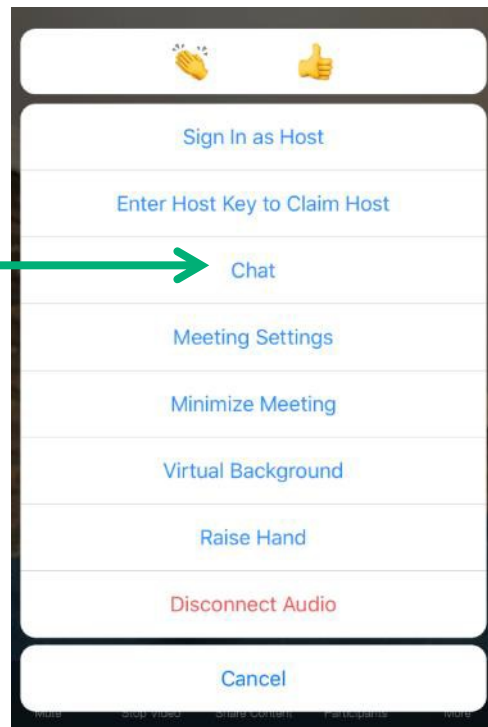
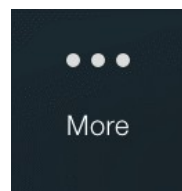


Chat Function: If you have questions that come up when the facilitators have your microphone muted, or if you feel more comfortable typing in your questions or participation, feel free to click/tap on the chat icon. This will open up a chat box, and you can type in your question. You can also click/tap on the chat box to see what other participants are writing. On your mobile device or tablet, you will have to tap “More” and then tap “Chat”

On Laptop/Desktop:



On Tablets or Mobile Devices:



Different Views:

On Your Laptop or Desktop Computer

The Default Setting will always show the video of whoever is speaking. If multiple people are speaking at the same time, the video will show whoever may be speaking louder. If you would like to switch to see everyone’s video, select “Gallery View” in the top right.

On Your Tablet or Mobile Device

You can swipe left and right to change your views. The first window will show the video of whoever is speaking. The second window will show a grid of up to four participants at a time.