FULLEN FINANCIAL GROUP

FULLEN FINANCIAL GROUP'S REMOTE MEETING CAPABILITIES

Fullen Financial has been conducting planning meetings in our client's homes and offices for many years by utilizing a number of technology tools that enable a robust virtual planning process. With these capabilities we walk our clients through a comprehensive financial plan, investment account transfers and the management of their portfolios, in a secure environment, without them ever having to leave their home or office.

While many of our clients choose to meet with us at our office, clients who prefer the ease and convenience of meeting in their home, or who live outside of central Ohio, can work with us using the following programs. We walk you through the use of these tools and provide them at no cost.

1. **Skype for Business** – provides video conferencing for multiple meeting participants, as well as the ability to share screens for enhanced collaboration. Skype for Business is a secure, no-cost service that does not require our clients to have a Skype account or download software to their desktop or mobile device.
2. **Dropbox** – allows for secure document sharing and file transfer, and provides a document vault for client files, planning reports and account statements. Dropbox is free to our clients, and only requires the setup of a personal Dropbox account linked to your email address.
3. **MoneyGuidePro** – offers industry-leading, goal-based planning software in a secure, online environment, enabling a collaborative planning process, and allowing our clients to create their own planning scenarios. There is no cost to our clients for access to this program.
4. **DocuSign** – enables us to obtain electronic signatures for account applications and other investment account documents. It is provided free of charge by our custodial and trading partner, TD Ameritrade.

If you would like to schedule a meeting with us, or simply would like to learn more about our approach to financial planning and investment management, please email Kevin Fix at kevin@fullenfinancial.com.