

Virtual meeting checklist

Before your meeting

- Get your technology ready.**
 - Watch the tutorial for your preferred virtual meeting platform.
 - Double-check your settings.
- Look and sound good.**
 - Look presentable.
 - Check the camera angle.
 - Face natural light.
 - Minimize distractions.
 - Ensure a clean and professional background.
 - Remove or mute background noises.
- Open all shareable documents and content to ensure they are ready to use.
- Prep your meeting notes and anything else you need to ensure a successful virtual meeting.
- Identify a “Plan B” for connecting with attendees and sharing materials in case of technical difficulties.
- Take a deep breath and know that you can do this!

During your meeting

- Follow the recommended virtual face-to-face sales procedures.**
 - View the client and their valid, legible, and unexpired government-issued picture identification.
 - Verify their identify through the videoconference and record the information in the Customer Identification Verification section of the Financial Professional’s Report.
 - If your client is not in their state of residence, it may be considered a nonresident sale. In that case, you must follow the Allianz Life nonresident sale procedures.
 - Follow all applicable Allianz Life policies and state requirements when conducting virtual business.
- Verbally identify where you are in the meeting’s agenda.**
(e.g., “We just finished opening remarks and now we’ll discuss agenda item #2 ...”)
- Check in frequently with attendee(s).**
(For groups: Request round-robin responses – “Are there any more questions on X?” – and wait for each attendee to answer verbally or chat.)
- Make sure to formally close out of the meeting.

After your meeting

- Send out all sales materials you didn’t distribute in advance.
- Remember to include any next steps or action items for your clients.



If registered, producers should follow the requirements of their broker/dealer and registered investment advisor.

This material is designed to provide general information on the subjects covered and is not intended to provide specific legal advice. Please note that Allianz Life Insurance Company of North America and their representatives do not give legal advice.

You are encouraged to seek legal counsel as necessary for your situation.

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