

Client Digital Capabilities: Step-By-Step Instructions

Cisco WebEx Meetings

[Home](#)

Join a WebEx Meeting, Event, or Training Session:

Using the WebEx Meeting Link in an E-Mail or Calendar Invitation (preferred method):

- From a Desktop:
 - Open your e-mail or calendar invite to the WebEx
 - Click the green "Join Meeting" button
 - The WebEx Meeting App will launch for you to select audio and video

Note: first time users may experience a slight delay as the "run-time client" downloads

- From a Mobile Device:
 - Open your e-mail or calendar invite to the WebEx
 - Click the green "Join Meeting" button in the invite

Note: if you do not have the mobile WebEx Meeting app already downloaded, you will be re-directed to your App Store to download

Using the WebEx Meeting Number & Password in the E-Mail or Calendar Invite:

- From a Desktop:
 - Navigate to <http://goto.webex.com>
 - Enter the meeting number provided by your Financial Advisor/Team
 - Click "Join"
 - Enter the meeting password and then click "ok"
 - Click on the green "Join Meeting" button
 - Enter your name & e-mail address
 - Click "Next"

- From a Mobile Device:
 - Download & launch the WebEx Meet App
 - Tap "Join Meeting"
 - Enter the meeting number provided by your Financial Advisor/Team
 - Enter your name & e-mail Address
 - Tap "Join" in the top right corner
 - Enter the meeting password
 - Tap "Accept"

Connect to Audio and Start Your Video:

Prior to entering the meeting, you will be prompted with a preview to connect your audio and video settings. This way, you can ensure everything looks and sounds correct. You can always modify these settings once you are in the WebEx.

- Click the audio drop-down menu
- Choose how you want to hear the meeting:
 - Use computer audio – use your computer with a headset or speakers
 - Call me at – Enter or select the phone number that you'd like the meeting service to call you on
 - Call in – Dial in from your phone when the meeting starts. A list of call-in numbers will appear after starting the meeting
 - Don't connect to audio – you won't hear any audio in the meeting. This method is used if you are already on the phone with your FA/Team
- To enter the meeting with your audio muted and/or your video turned off, click the microphone or video camera button respectively
- Once your settings are correct, click "Join Meeting"

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