



Exit Planning Boot Camp Livestream

Increase your knowledge of Exit Planning to be better prepared for more complex planning conversation with your business owner clients.

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BOOT CAMP LIVESTREAM INSTRUCTION GUIDE

We know many of you have used Zoom or participated in a virtual training before, but for those of you who have not, we figured you would benefit from some guidelines and tips.

AGENDA

Session 1 - Introductions, Overview of BEI, Intro to the 7 Step Exit Planning Process

Session 2 - Quantify Business & Personal Financial Resources, Maximize & Protect Business Value

Session 3 - Business Transfer

Session 4 - Business Continuity, Personal Wealth & Estate Planning

Session 5 - Recap, Overview of BEI Tools and Resources

We will meet 5 times for 2 hours. Each session consists of 100 minutes of teaching + 20 minutes of Q&A and discussion.

PREPARATION BEFORE THE TRAINING

TEST YOUR EQUIPMENT

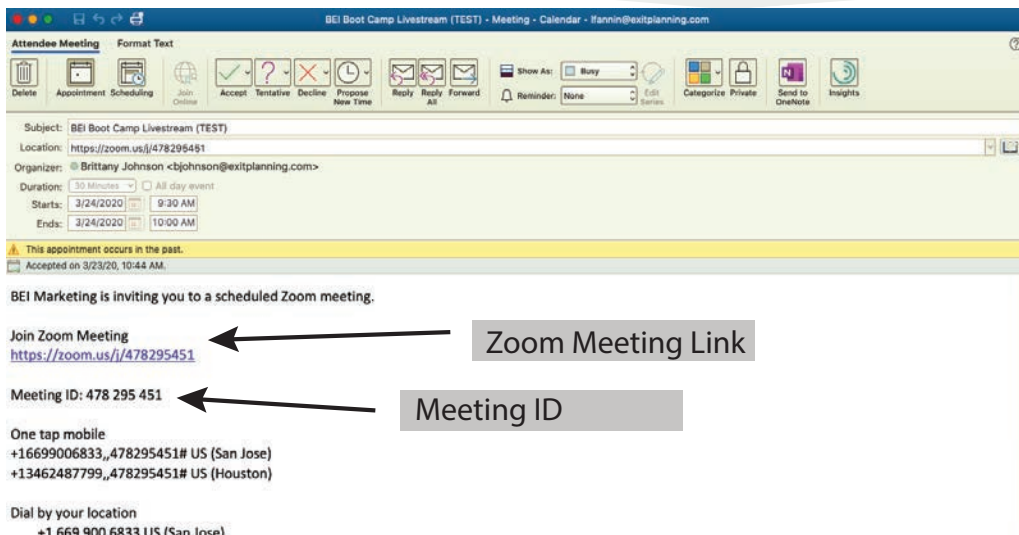
Please remember to test your microphone, speakers, and camera before the day of the training to make sure everything works properly. This will save you a great deal of time if this testing is performed before the training begins.

DOWNLOAD ZOOM

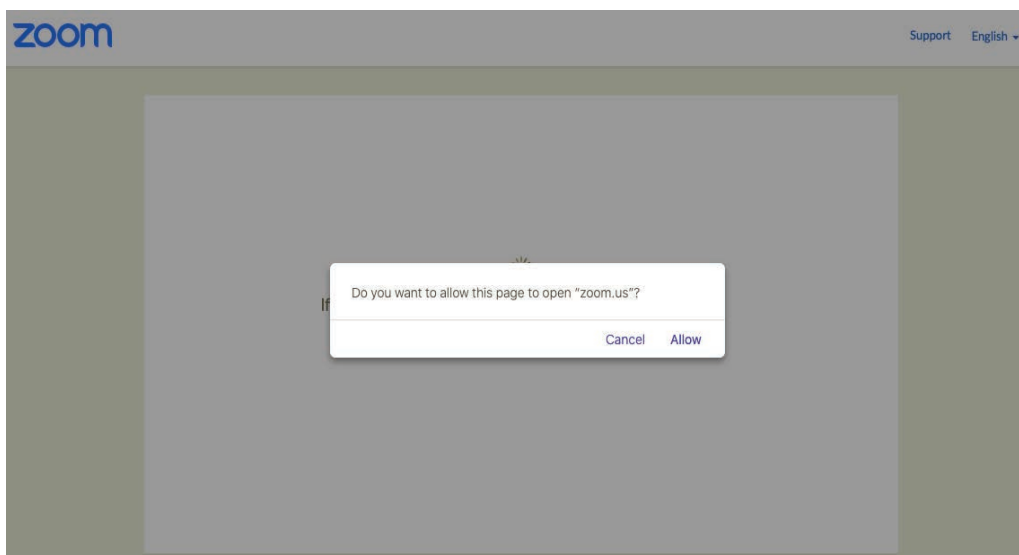
Zoom is the meeting tool we will use to conduct the Boot Camp Livestream. Use the following link to download Zoom before the day of the Livestream training. It can sometimes take up to 10 minutes to download. <https://zoom.us/download>

JOIN ZOOM MEETING

Once the Zoom meeting is saved on your calendar, you will be alerted when the training is beginning. At the start of the training, open the invite in your calendar and click on the Join Zoom Meeting link. Use the Meeting ID to enter the Zoom Meeting Room. You can also do this directly from the links in the email you received with the Livestream information.



Click open Zoom when it prompts.



HOW TO JOIN AUDIO

You can choose to join via your computer audio OR by phone. If you choose the phone option, Zoom will prompt you with a phone number and allow you to input the Meeting ID and Participant ID. See images below. Do not join by phone and computer audio as it creates unnecessary feedback.



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AUDIO COMPLICATIONS

If you are experiencing any issues with your audio, we ask that you check a few things before contacting us for support.

- Make sure your microphone on your computer works properly and is turned on.
- Please be sure your volume is turned up as well.
- If you are using your cell phone, be sure you are not muted, and your volume is turned up.
- If you hear an echo, you are most likely logged on from your computer and your mobile device. Please only use one or the other.

ZOOM MEETING ID

IMPORTANT REMINDER: You will receive a Meeting ID to access the meeting. Please keep an eye out for each email and save the meeting invite to your calendar.

FEATURES TO USE DURING THE TRAINING

CHAT

Please locate the Chat feature in the middle of the Zoom tool bar at the bottom of your screen. Please feel free to use this to ask a question during the presentation or start discussions with your peers.

MUTE/UNMUTE

You can locate the Mute icon on the far-left side of the tool bar next to the Video icon. Please keep yourself muted during the presentation to minimize distractions. Feel free to unmute yourself during the Q&A/discussion portion of the presentation.

VIDEO

You can locate this icon on the far left-hand side of your tool bar next to the Mute icon. We recommend that you keep your video on during the session so that the presenter and your peers can see who they are interacting with but we understand everyone needs a break from the camera so feel free to stop your video at any point.



SPEAKER/GALLERY VIEWS

You will be able to view some of the BEI team members, our presenters, and your peers joining the training. You can either choose to view them in Speaker View or in Gallery View. You can locate this setting on the top-right section of your screen. You will also have the availability to move the list of participants from the right-hand side of your computer screen to the top of your screen.

The border around each participants image will light up so we can decipher who is speaking. Only one person can speak at a time, so be patient and use the chat feature if necessary.



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COMPLETION OF TRAINING

Expect an evaluation survey via email after the last session of the Boot Camp Livestream. You **MUST** complete the survey before you receive your certificate of completion. Please tell us honestly what you thought of the event.

Upon completion of your evaluation, you will receive a digital copy of your certification.

THANK YOU FOR JOINING US

QUESTIONS/CONCERNS

Thank you from all of us at BEI and we hope you enjoy the training! If you have any questions or concerns, issues with Zoom, or need anything from the BEI team, please do not hesitate to reach out.

IMPORTANT REMINDER: Please also be aware that many individuals and businesses are using Zoom since many employees are working remote during this time. If you experience any issues with Zoom, our first suggested solution is to close out of the Zoom meeting and try to sign back in. If you are unable to fix the problem, feel free to reach out to events@exitplanning.com for assistance. You may also call the BEI office at 303-321-2242.



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