



## **THE ELITE WEALTH MANAGER**

BUILD A SIMPLE AND ELEGANT WEALTH MANAGEMENT BUSINESS

# **RESOURCES AND BONUSES**

## **WHITEBOARD TOOLS**

# VIDEO TRANSCRIPTION

**Heather O'Donnell:** At times physical whiteboards can have some restrictions and going digital is a great way to show and share content visually, both live and remotely. Whiteboards are fantastic to demonstrate the wealth management formula to use during your client review meetings or illustrate key issues you want to draw or list out. Whiteboards are great for any client meeting where you would normally use a legal pad to sketch concepts with pen and paper. Cloud apps can allow easy collaboration, and some provide comments, the ability to attach files and share digital whiteboards. In this screencast I will walk you through several digital whiteboard options.

Their first digital whiteboard is using Zoom, a very simple whiteboard where when you click to share, you'll have the option to select a whiteboard. I'll bring this up on screen so you can see, and I'll bring these controls down so you can see those as well. So, with this whiteboard you can do texts, you can draw, you can stamp, spotlight, erase, format and clear. And I'll just give you a couple of quick examples here. So, if you're drawing or sketching you can use the draw tool, and we'll add some text here as well.

We can add some stamps if we'd like to illustrate something we're trying to point out. So, variety of different options here for annotation on the whiteboard. So, this is a great tool, very easy to use and get configured and set up. We're going to move on now to a Limnu. So, Limnu is a cloud-based whiteboard, and I'm logged in here and I'll just do a new whiteboard here so you can see. And again, they have a variety of tools that you can use to whiteboard and illustrate. And this provider just recently announced the launch of their video conferencing. So, while you're working on your whiteboard you can also talk to people and collaborate.

Again, similar concept. Do you have some tools down here with different options for your tips, for your pin and your colors, the erase tool and select tool, and then being able to move things around as well? You can also export from this system. So, you can export the file, you can also add an image, you can add a note, a label, and you can add a pin. So, another handy tool that you could consider if you needed a digital whiteboard. Here is another product called Explain Everything, which is a cloud-based product as well. And in this system, I'm logged in we're just going to create a new whiteboard. And we can do audio, or we can choose from a template, we could import from a file.

So, we'll just start with a blank one. And so, this whiteboard again you can invite people to it. You have all the tools on the left, much like Zoom and the other one we just showed you. So, some drawing tools, coloring, we can fill the page, we can do text with different types of styles as well. So, this one actually has quite a bit of flexibility within it. You can also do a voice with this one. You can allow people to actually edit the whiteboard as well. If you wanted to share it, you can share it with a link and allow them to edit it. So, a lot of great tools with this one as well.

# VIDEO TRANSCRIPTION

And moving on we're going to talk about Whiteboard Fox. So, another whiteboard, a cloud-based application, a little simpler. And again, we can do some drawings here, we can change the colors, we can erase, move, and we can undo and redo. So very simple on this one. We can add pictures, images and we can also share. And you can do a snapshot as well, which takes a screenshot of it. So, several options here. So, there are lots of options for white boarding. Again, to recap, Zoom is a great tool, great for conferencing and white boarding. Included with your Zoom subscription there's Limnu, Explain Everything and Whiteboard Fox. We hope you find this useful and we look forward to seeing you online.