

IMPORTANT WEBINAR INSTRUCTIONS

Dear Colleague,

Thank you very much for registering to attend our webinar **“Client Retention: 4 Ways It Influences Firm Growth”** presented by CPA Trendlines and Capstone Marketing.

The webinar is scheduled for:

Tuesday, October 9, 2018
2:00-2:30 p.m. Eastern
(That’s 1:00 p.m. Central, 12:00 p.m. Rocky Mountain, 11:00 a.m. Pacific)

Here are some useful tips to get the most out of the webinar:

- Reserve a conference room and set up a data display and computer so all your team members can watch the presentation.
- Print enough copies of the presentation handouts so your team members can take notes.
- During the webinar you can submit questions using the Chat box in the lower left corner of the screen.
- The telephone lines will be unmuted at the end for Q&A.
- If you’d like to preserve your privacy, you may use a screen name or only your first name when logging in.

For this webinar, we’ll be using Adobe® Acrobat® Connect™ Pro Meeting.

This fast-paced webinar will start promptly at 2:00 p.m. Eastern. *Please connect 10-15 minutes in advance for a tech check. We will not be able to handle service or support requests during the session.*

To join the meeting:

- 1) Point your web browser to:

<http://capstonemarketing.adobeconnect.com/Strategies>

 **Secure** | <https://capstonemarketing.adobeconnect.com/Strategies>

- 2) Type your name and “Enter as a Guest.”

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☒ Enter as a Guest

Type your name here

Name

By entering a Guest Name and clicking "Enter Room", you agree that you have read and accept the [Terms of Use](#) and [Privacy Policy](#)

Enter Room

☐ Enter with your login and password(Required for hosts, recommended for registered users)

(You don't need a login or a password.)

- 3) Click “Enter Room.”

If you would rather use your telephone for the **audio** connection rather than VOIP (audio via your computer speakers) dial on your telephone: **1 (800) 832-0736**. You will be asked to enter Room Number: **9516215**.

If you've ever attended an online web conference, you should feel very comfortable with the state-of-the-art Adobe Acrobat technology. But if you'd like to pre-test your system (it takes less than a minute), or if you need additional help, please click:

https://admin.acrobat.com/common/help/en/support/meeting_test.htm

Following the webinar, you will be invited to complete a very brief feedback survey. We would appreciate it if you would take a few minutes to let us know your thoughts about the session. We are committed to continuous improvement.

Watch your email for additional reminders from Capstone Marketing and a link to download the slide deck for the webinar. Meanwhile, we look forward to a fun, focused meeting with you.

Sincerely,

Jean Caragher
Capstone Marketing

Rick Telberg
Bay Street Group LLC

P.S.: If you have any additional questions or requests before the webinar, please don't hesitate to contact Jean (at jcaragher@capstonemarketing.com, or 1-727-324-3379) or Rick (at rtelberg@baystreetgroup.com, or 1-914-602-4641) no later than 30 minutes prior to the program.

P.P.S. This webinar will be recorded.