Coronavirus
COVID-19

Irish Life

HOW TO CONDUCT YOUR REMOTE

MY RETIREMENT PATHFINDER MEETING

In these unprecedented times we find ourselves in, Brokers now need to explore different ways of engaging with and advising clients and doing so digitally is becoming the most popular way. In the absence of face to face meetings, it can be challenging to advise clients and doing so by way of remote meeting is probably the easiest way to ensure that you can advise your clients appropriately and answer any queries they have in the moment, just as you would if they were sitting in your office.

One of the most involved piece of advice you will give to your client is in their approach to retirement and indeed at that point where they decide to take their benefits. This has consistently been an area that Brokers truly add value and will continue to be even more so during these times. Irish Life has developed a tool to assist the Broker in this regard and enhance the client relationship called My Retirement Pathfinder and the purpose of this document is to offer some advice on how best to prepare and conduct a remote piece of retirement advice using this tool.

STAGE 1 - PREPARATION

Choose your remote video conferencing system such as Zoom, Go to Meeting, MS Teams or any of the other systems that are available out there.
To assist you in this, we have developed some documents to help you in using these systems which can be found here:

CLICK TO LINK

ZOOM User Guide

GO TO MEETINGS User Guide

MS TEAMS User Guide

STAGE 2 - PREPARATION

Contact your client to ensure that they are happy to conduct the meeting via video conferencing. The user guides of the various systems will outline what is required of the client but in most cases they are only required to click on a link that you will email them.

Arrange a time to call the client when they feel they will be able to give you their full attention. With regards to time, it is up to you whether you want to conduct a longer single meeting or split it into smaller meetings. In any event, it would be best to advise your client to allow for an hour for the first meeting.

Consider what data/information you will need for the client to bring to the meeting such as:

- Details including values of any maturing pensions.
- Details of any pensions they are currently receiving.
- Likely date of retiring.
- Details of any occupational schemes they are members of.
- Details of all income.
- Details of all assets/liabilities.
- Ask them to give some thought as to their likely expenditure in retirement.

STAGE 3 - PREPARATION

Schedule the appointment using your video conferencing tool and send out the necessary link to your client.

5 minutes prior to the scheduled meeting, log on to My Retirement Pathfinder on Bline or click the link here.

STAGE 4 - THE MEETING

Using the video conferencing facility allows you to conduct your meeting as normal.

By using the Screen Sharing facility, you will be able to toggle into My Retirement Pathfinder so that your client can work through the report with you and you can conduct your consultation as you gather information and input this into the system.

My Retirement Pathfinder will then prepare the calculations and assist you in outlining your client's options in a detailed report. You can go through this on the call with the client or email or post this to them following the meeting.

This video will assist you in navigating the system.

Follow up meetings can be conducted in the same way.

STAGE 5 - EXECUTION OF BUSINESS

When the client has decided to proceed with the business you can email out the necessary paperwork.

When you have received the completed paperwork you can send to Irish Life or you can key the case on B Line. Your Account Manager can talk you through this process or alternatively you can view this video which should help you in keying it yourself.

You can then manage the case through to issue in the normal way.

We hope the above has provided some ideas around how to conduct a remote meeting but if you require any further support please contact your Account Manager.

This document is for Financial Brokers only.

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