



Mikogo for Investment Management: Bringing clarity to decisions that help protect your client's financial future

Making smart decisions about financial investments can be complex, and many people turn to professionals for help – experts they trust to provide information and guidance about the options available.

As more investment management tools go digital, many professionals are adding Mikogo to their toolbox. Its real-time capabilities enable a high level of customer service that's flexible, responsive and convenient.

Michael Bishop, CFA, of Bishop & Company Investment Management, uses Mikogo to keep himself and his clients on the same page – literally. "I can directly show clients what I want to emphasize to them, instead of mailing papers and asking them to follow along."

Malcolm Greenhill of Sterling Futures agrees. "Even where personal meetings are possible, clients often prefer to meet online as it takes less time and is more convenient."

A Flexible Option for Regular Consultations

Greenhill enjoys travelling, but doesn't compromise on customer service. "I meet with most clients at least four times a year," he noted. And for him Mikogo provides a flexible way to stay in touch when travelling – wherever he happens to be. "I would not dare to venture abroad the way I do without the ability to arrange online meetings on the fly."



"My clients are confident that I will always be there for them if they need me. It is an incredibly powerful tool."

- MALCOLM GREENHILL, STERLING FUTURES

He also uses Mikogo to feature special guests in presentations to clients and prospects. "I can get a speaker who lives anywhere to give a PowerPoint presentation to my clients," he said.

"In the beginning these online meeting programs brought a reaction of awe," said Greenhill, observing that technology use has become so common that the best reaction is



no reaction. "If there are no technical hiccups, the program has done its job. Mikogo is so simple and intuitive that I never have any such problems."

A Convenient Way to Ensure Everyone Understands

While most of Bishop's clients are local, he also works with people located across the United States, which means face-to-face meetings are not always the most convenient option.



"There's a real 'wow' factor when I use Mikogo with my clients – it's a value-added benefit that I can offer to them."

- MICHAEL BISHOP, CFA, BISHOP & COMPANY INVESTMENT MANAGEMENT

"My clients trust me to provide clear recommendations," said Bishop, who added that Mikogo makes clear communication easier.

"I review a variety of documents with my clients: PDFs, graphs, charts, and reports that review their financial assets and the positioning of those assets," Bishop explained.

"Mikogo's whiteboard feature allows me to draw lines or circles around specific items in the materials I am reviewing. I can focus my clients' attention exactly on what I am trying to highlight to them – nothing like it!"

He says his clients are impressed by how easy the whole process is. "We can review their entire portfolio together live, online," he said. "It's much more efficient."

A Flexible and Responsive Solution

Whether enabling freedom from your office or helping you provide value-added service to your clients, Mikogo's screen sharing and remote desktop capabilities are flexible enough to adapt to your needs.



More information at www.mikogo.com/customers