

We worry about your money, so you don't have to.



www.tupicoffs.com.au

Tupicoffs

The Independent Financial Planners

Making a meaningful positive difference

Tupicoffs Going Digital

Tupicoffs



What's happening?

Going Digital

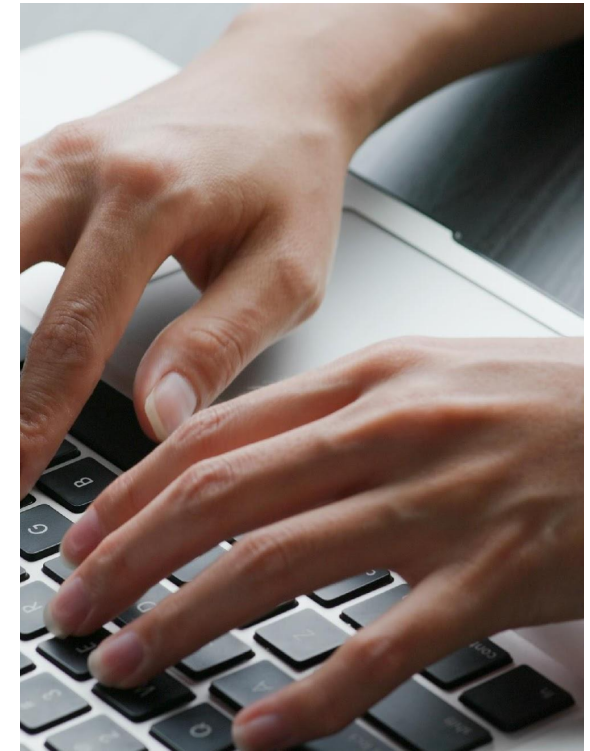
Digital Transformation

Happening quicker because of COVID-19.

Ideally will make business simpler and quicker for you

Facing into some new challenges

Need to be aware of the risks and take reasonable steps to manage them



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The benefit to you

Going Digital

Ultimately makes your life and relationship with us easier

We can provide a better, more streamlined service to you

Makes our processes more accurate

Future-proofing our advice delivery.



Ways we are doing this?

Going Digital

zoom

DocuSign®



calendly



The Zoom logo is displayed in white lowercase letters on a solid blue background.

zoom



- Flexible online method for meeting delivery if you can't make it into the office
- Secure online platform
- Easy to use on phone or computer

DocuSign®

Secure online signing

No need to print, scan or post

Be emailed a signed copy

Easy to use on phone or computer

Sign with eSignature



How to Sign a Document

DocuSign | University






- Only shows available times when you are booking
- Automatically adjusts for different times zones and daylight saving time.
- You can book at any time
- You can choose in person, phone or video meeting
- You can reserve a free onsite car park when you book
- You can still call the office if you prefer





Neil Kendall CFP

Tupicoffs Ongoing Advice Meeting with Neil Kendall

 1 hr 30 min

Due to COVID-19 we cannot conduct face to face meetings if you are unwell. We are happy to cancel, reschedule or meet via Zoom if you have any symptoms of ill health.

 Brisbane Time (4:00pm) ▾

 Troubleshoot

Select a Date & Time

April 2021 < >

MON	TUE	WED	THU	FRI	SAT	SUN
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30		

More to come

Password Security

- ◆ We worry about online security
- ◆ Videos released shortly which will explain how you can ensure your online information is secure.
- ◆ Feel free to share this video and our subsequent videos with family and friends



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Thank You

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