

Video Reference Guide with **SENIOR FINANCIAL SPOTLIGHT**

The appearance of your physical space is a critical part of your on-screen image. Here are some easy tips and tricks to help make sure it's the best it can be! Follow these tips and you'll be well on your way to creating an engaging and impactful video from your home or office.

LIGHT YOUR FACE WELL

Make sure you have a light source directly in front of you or in front and slightly at an angle. You should not be lit from the back, directly above your head, or unevenly from the sides; these positions all cause a silhouette effect and unflattering shadows.

Try to face a window, and don't have your back to a window. If you can't face a window, or your interview is at night, set up in a well-lit room and try not to get any lights in the video frame.

SET YOUR CAMERA AT EYE LEVEL

Your camera should be pointed at the front of your face (not the side) and should be positioned at or near eye level (so you are not looking up or down to look into it). This may mean that you put your device on a stack of books to achieve the correct height. This helps you look more natural and relaxed on the screen.

DON'T WEAR SMALL OR TIGHT PATTERNS

Depending on the camera on the device you're using, small or tight patterns like polka dots, stripes, or floral patterns can look blurry or strange. This can be very distracting on camera. Solid colors or larger patterns are the way to go.

FILM IN LANDSCAPE

If you are using a laptop or desktop computer, you're good to go. However, if you are using a tablet or phone, be sure to turn the device to a horizontal position.

BE AWARE OF YOUR BACKGROUND

A little bit of texture can be nice for the background of a video, but too much can be busy and distracting. Set up with a wall as a background or a clean space that does not divert the viewer's attention. Remove any distractions like piles of paper or books, cups or plates, clutter, an open door, a glass wall overlooking a hallway or roadway, etc. You want people to be focused on you, not what can be seen in the background.

INTERRUPTIONS AND BACKGROUND NOISE

Close doors and windows to prevent interruptions and background noise. Put a sign on the outside of your door that says, "Video in Progress—Do Not Disturb." Alert coworkers, family members, etc., that they should not knock or enter during the event time.

CONTENT IS KING

Content is always the most important thing! Make sure to plan out and rehearse what you're going to say. Making sure your shot looks good goes a long way, but the content of what you're saying, and how you say it, is what will engage people.

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Here is the list of topics we will review with you. This is meant to be a guide, not a prescription. The interview should feel like a friendly conversation with someone asking about your business.

- 1** What led you to work with seniors on their specialized insurance needs?
- 2** How did you get into the senior financial market?
- 3** What made you want to get into insurance?
- 4** Describe the biggest challenges you see your clients facing regarding their financial situation.
- 5** What are the biggest concerns you help your clients resolve?
- 6** What goals are you able to help your clients attain?
- 7** Without divulging any specific details, can you tell us about a time you helped a client achieve one of those goals or overcome one of these challenges?
- 8** Tell us a little bit about yourself—whatever you feel comfortable with— maybe a little about your family or hobbies—something we wouldn't know from spending time in your office but would have to discover hanging out on the weekends.
- 9** If you had a crystal ball, and could see the future—what would you see as the biggest challenge facing the senior financial market in the next 3–5 years? [We won't hold you to it!]
- 10** What challenges do you see looming on the horizon for the senior financial market?