

How to Use Triumph's Online Calendar

1. Go to [Calendly.com/teamtriumph/](https://calendly.com/teamtriumph/)
2. Select your meeting type from the options given on our calendar home page. These categories include:
 - a. **Introduction Meeting** for new clients
 - b. **30-Minute Phone Call** for a quick discussion
 - c. **30-Minute Meeting** for brief in-person meetings
 - d. **1-Hour Meeting** for a longer in-person meeting outside of a typical review
 - e. **Review Meeting** for in-person portfolio reviews
 - f. **Review Meeting (Zoom)** for online portfolio reviews

 Introduction Meeting ▶ <p>Meet our staff and learn how Triumph can serve you by scheduling a 30-minute introduction meeting with us! This will take place at our office, in-person.</p>	 30-Minute Phone Call ▶ <p>This meeting is half an hour long over the phone and discusses topics of your choosing, which you will select on the confirmation page after picking a meeting time.</p>
 30-Minute Meeting ▶ <p>This meeting is half an hour long in office and discusses topics of your choosing, which you will select on the confirmation page after picking a meeting time.</p>	 1-Hour Meeting ▶ <p>Our standard meetings are 1 hour long in office and discuss topics of your choosing, which you will select on the confirmation page after picking a meeting time.</p>
 Review Meeting ▶ <p>Our review meetings are typically 1 hour long and includes a thorough review of your portfolio. This meeting will take place at our office, in-person.</p>	 Review Meeting (Zoom) ▶ <p>Our review meetings are typically 1 hour long and include a thorough review of your portfolio. "Zoom" means your review will be conducted via video conference.</p>

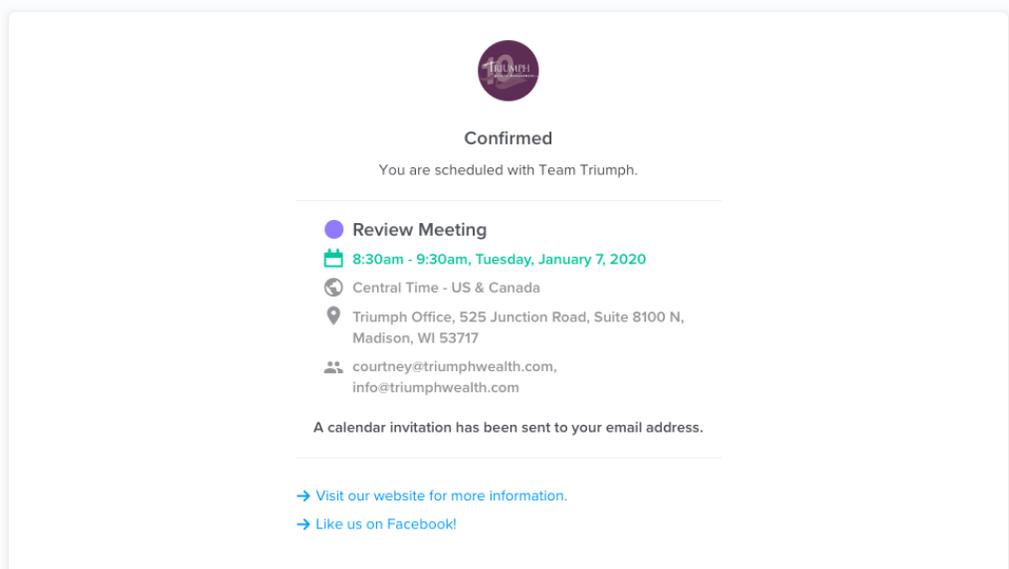
3. Select the day and time from the available options for that meeting type. *Please note that the times offered are based on the time zone that you are currently located in as indicated on the bottom of the page (i.e. if you're on your computer in California, the time options shown are in PST).*

The screenshot shows the 'Select a Date & Time' interface for a 'Review Meeting'. On the left, the Triumph Wealth Management logo and team information are displayed. The main area features a calendar for January 2020 with the 7th of January selected. To the right of the calendar is a list of time slots from 8:30am to 10:15am. A red box highlights the time zone selection dropdown, which is currently set to 'Central Time - US & Canada (11:42am)'.

- Once you choose your meeting day and time, you will confirm your choice by filling in your information in the appointment window. This lists your chosen meeting details on the left side. You should add your name, the email you want used for communications, any addition attendees you want notified, etc. If you think that you will need more than the allotted time for the meeting, please indicate this by checking the “Yes! I would like more time” box. Once you’re set, click “Schedule Event” to confirm.

The screenshot shows the 'Enter Details' interface for a 'Review Meeting'. On the left, the meeting details are summarized, including the date and time (8:30am - 9:30am, Tuesday, January 7, 2020) and the time zone (Central Time - US & Canada). The main area contains a form with the following fields: Name (Courtney Miller), Email (courtney@triumphwealth.com), and Guest Email(s) (info@triumphwealth.com). There is a checkbox for 'Yes! I would like more time.' and a section for beverage preferences with 'Water' selected. A blue 'Schedule Event' button is at the bottom.

- Your confirmation page outlines the meeting details and indicates that you (and additional guests) will receive a calendar invitation for the appointment.




Confirmed
You are scheduled with Team Triumph.

Review Meeting
 **8:30am - 9:30am, Tuesday, January 7, 2020**
 Central Time - US & Canada
 Triumph Office, 525 Junction Road, Suite 8100 N, Madison, WI 53717
 courtney@triumphwealth.com, info@triumphwealth.com

A calendar invitation has been sent to your email address.

[→ Visit our website for more information.](#)
[→ Like us on Facebook!](#)

- Your calendar invitation will go to the email address(es) that you listed for your appointment and will include your meeting details such as parking directions, Zoom information (if online meeting) and links to reschedule/cancel your meeting.

 **REVIEW MEETING: Courtney Miller with Nathan Brinkman**

 **Brinkman, Nathan <nathan@triumphwealth.com>**
 Required:  Miller, Courtney;  Triumph Info
 Thursday, January 2, 2020 at 10:43 AM

 **Tuesday, January 7, 2020 at 7:30 AM - 8:30 AM.**
Triumph Office, 525 Junction Road, Suite 8100 N, Madison, WI 53717

 Please respond.

 This meeting has been adjusted to reflect your current time zone. It was initially created in the following time zone: (UTC-06:00) Central Time (US &...)

<p>Event Name: Review Meeting</p> <p>Our review meetings are typically 1 hour long and includes a thorough review of your portfolio. This meeting will take place at our office, in-person.</p> <p>Location: Triumph Office, 525 Junction Road, Suite 8100 N, Madison, WI 53717</p> <p>Please park in the ramp behind our building. Enter the South (Johnson Bank) Tower on the first floor and follow the hallway past the Blue Plate Cafe until you reach the elevators in the North (TDS) Tower. Take the elevators up to the 8th Floor and enter the MassMutual Suite. Please register with the receptionist.</p> <p>What beverage would you like waiting for you when you arrive?: Water</p> <p>Need to make changes to this event? Cancel: https://calendly.com/cancellations/DAIKTULD55SL3U4D Reschedule: https://calendly.com/reschedulings/DAIKTULD55SL3U4D</p>	<table border="1"> <tr><td>6 AM</td><td></td></tr> <tr><td>7 AM</td><td></td></tr> <tr style="background-color: #e0e0e0;"><td>8 AM</td><td>REVIEW MEETING: Courtney Miller with Nathan Brinkman Triumph Office, 525 Junction Road, Suite 8100 N, Madison, WI 53717 nathan@triumphwealth.com</td></tr> </table>	6 AM		7 AM		8 AM	REVIEW MEETING: Courtney Miller with Nathan Brinkman Triumph Office, 525 Junction Road, Suite 8100 N, Madison, WI 53717 nathan@triumphwealth.com
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7. If you choose to reschedule your meeting, click the link in your calendar invitation. You will be brought back to our online calendar where you can choose a different day and time from the options listed. You can also provide the reason for the change in the details.

The screenshot shows a 'Reschedule Event' interface for a 'Review Meeting'. On the left, the event details include the Triumph logo, 'Team Triumph', a 1-hour duration, and the location: 'Triumph Office, 525 Junction Road, Suite 8100 N, Madison, WI 53717'. The current time is listed as 'Former Time (Invitee)' from 8:30am to 9:30am on Tuesday, January 7, 2020, in Central Time. A note states: 'Our review meetings are typically 1 hour long and includes a thorough review of your portfolio. This meeting will take place at our office, in-person.' The main area features a calendar for January 2020 with the 7th highlighted. To the right, a 'Select a Date & Time' section shows a list of available times: 8:30am (Former Time), 8:45am, 9:00am, 9:15am, 9:30am, 9:45am, 10:00am, 10:15am, and 10:30am. A 'Confirm' button is visible next to the 8:45am option.

8. If you choose to cancel your meeting, click the link in your calendar invitation. You will be brought to our cancellation page where you can add the reason for the cancellation. This will send an update to us as well as other attendees that the meeting is cancelled.

The screenshot shows a 'Cancel Event?' interface. On the left, the event details are repeated: 'Team Triumph', 'Review Meeting', 1 hour, 'Triumph Office, 525 Junction Road, Suite 8100 N, Madison, WI 53717', and '8:30am - 9:30am, Tuesday, January 7, 2020' in Central Time. The main area is titled 'Cancel Event?' and includes a 'Reason for canceling' text box. Below the text box is a blue 'Cancel Event' button. At the bottom, a message states: 'This event will be canceled for Courtney Miller and 1 guest'.