

# Video Production Checklist for Financial Advisors

Getting started with video is pretty daunting. This checklist will get you through your first video and hopefully many more.

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## CHOOSE A SPECIFIC TOPIC

- Brainstorm a list of 10 topics and prioritize by your top customer challenges

Consider

- Top questions from clients
- Biggest friction points when on boarding

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## CREATE A CONCEPT DRAFT

- Create an outline
- Develop main message
- Add supporting bullet points
- Organize into a coherent flow

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## FINALIZE SCRIPT

- Run through Hemingway App to simplify
- Read the script out loud to make sure it flows well
- Break the script up to 1-2 sentence segments

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## LIGHTING

- Lighting is the top factor in making your shot look good
- Make sure that the light sources are in front of you
- Go to a window and make sure you're facing the outside
- Use a lamp or brightly lit computer screen

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## SOUND

- Get your microphone as close to your subject as possible for the best audio and use a second iPhone
- Use a second iPhone or an external microphone adapter e.g. Sennheiser ME66 with a KV microphone adapter to send audio directly into your iPhone
- Clap once for the start of each take as a reference point for syncing the dedicated audio track with the bad sound from the video recording

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## VIDEO

- Shoot in 1-2 segments if using a laptop camera
- Make sure the camera is pointing slightly downward at the subject if using an iPhone camera
- Don't shoot vertical video since it will be viewed widescreen
- Use a tripod with an iPhone for stable shots
- Cover the lens for a second or two after a good take for easier editing
- Use the exposure focus lock if using an iPhone to stop auto refocusing
- Create 10-15 seconds of "B roll" clip or additional footage for editing later

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## EDIT

- Use video editing software iMovie(Mac users) or Magix Movie Edit Pro (Windows)
- Use the additional footage (B-roll) to hide the edits between each part of your script

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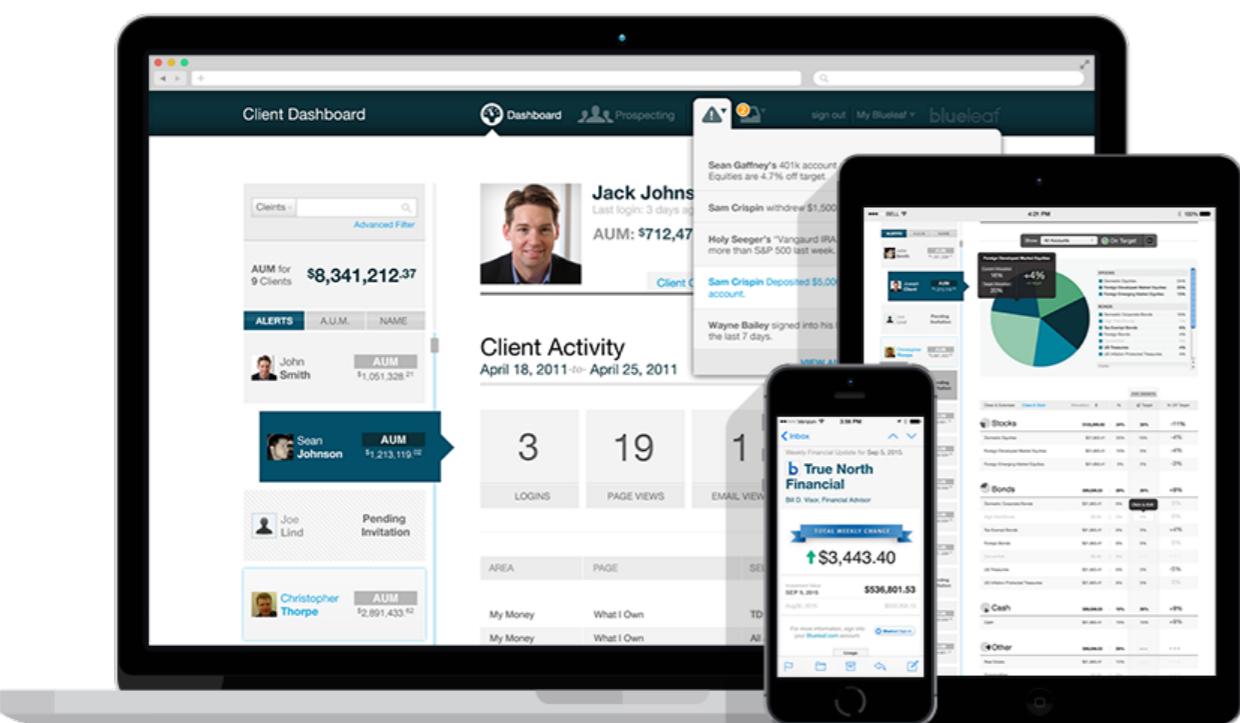
## PUBLISH AND EMBED

- Publish to YouTube-the world's second biggest search engine
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