

Marketing Suite

Frequently Asked Questions (FAQs)

Last updated 10.3.24

Table of Contents

GENERAL QUESTIONS	2
COMPLIANCE	3
CONTENT	4
EMAIL MARKETING	5
EVENTS	10
GREETING CARDS	11
SALESFORCE INTEGRATION	12
SOCIAL MEDIA	13
DBA QUESTIONS	15
CUSTOM CONTENT	16
POSTING	17
WEBSITES	22
WEBSITE MIGRATION	23
MORE QUESTIONS ON WEBSITES?	23
MISCELLANEOUS	23
RESOURCES	24

GENERAL QUESTIONS

- **What is the new Equitable Advisors Marketing Suite?**
 - The Equitable Advisors Marketing Suite is our new integrated Advisor Marketing Platform for Email, Website and Social content. Through our partnership with the NAF and Honor Guard, numerous vendors were vetted to find one with great designs, better content, and an easy-to-use platform.
- **Who is the vendor for this new platform?**
 - Equitable has signed a multi-year contract with FMG, a leading all-in-one, enterprise, marketing solution, trusted by major broker-dealers to increase client engagement and retention.
- **When will this new platform rollout?**
 - There are two primary components of the platform, each with a different rollout timeframe and strategy.
 - The website migration has been in progress since June 2023. We began the website migration project with the current Broadridge (Emerald) advisor sites, happening in waves depending on the type of site you have, through Q1 2024. Off-platform websites will be eligible to migrate to Marketing Suite beginning in 2024.
 - The marketing suite migration includes migration off My Marketing Station (MMS) for email marketing and includes event planning and direct mail marketing. This rollout is expected to begin with a Q3 field pilot and continue through in waves through Q2, 2024.
 - Additional details on the rollouts will be shared in coming months.
- **What is the cost of the platform?**
 - Marketing suite is included in basic Digital Essentials.
 - Websites – existing Broadridge (Emerald) websites will be migrated as part of this project rollout. Refer to [FB 23-135](#) for full pricing details.
 - New websites or requests to migrate off-platform website – please visit our [program microsite](#) for more information.

COMPLIANCE

- **I've updated my profile, but it does not appear to be with compliance for review.**
 - Be sure that you have clicked the "Publish" button. If publish is not clicked, the change will remain in draft mode and not be submitted for compliance review. Once "publish" is selected, it will route to the Compliance queue for review and approval.
- **How will I know if my compliance submissions have been reviewed?**
 - You can review compliance status at any time in the compliance tab on the platform. That tab will show cases currently with compliance, rejected by compliance and all compliance history.
 - In addition, a daily digest email is generated to every user each evening (unless you unsubscribe – not recommended) that will detail all compliance review changes.
- **Do I still submit customized email content to AdTrax for review?**
 - The current rules regarding creating new custom email content that were followed on the MMS platform will apply to the new FMG platform: PPG and above can create custom content. Please note that the submission process will change. Your submissions to Advertising Compliance will now be completed through the FMG platform. You will no longer need to submit custom email content through AdTrax. Advertising Compliance will review all custom content submissions directly within the FMG platform going forward.
- **Is there integration with AdTrax?**
 - There is no integration with AdTrax at this time. However, we are exploring potential integrations with AdTrax as part of a future enhancement to the marketing suite platform.
- **How will compliance know it is time to review my profile?**
 - Compliance will receive a Daily Digest email notifying them of new cases in their queue. In addition, when they log into the platform, they will also see a list of all new profile submissions that are ready for review. Please keep in mind that approval times will vary due to the transition the new platform.

CONTENT

- **Will there be a library of content created and available for use when the new platform goes live on Day One?**
 - Yes. Existing Equitable content is being reviewed and assessed for inclusion onto the platform. In addition, FMG continually creates relevant content monthly (~20-30 pieces a month), allowing our advisors to have access to a more robust Content Library, which will include Email, Web, and limited social media functionality. Note: Hearsay Social will continue to be utilized in the near terms to manage social media functionalities, including posting of original content.
- **Can I submit custom content for review?**
 - PPG and higher-level FPs can continue to create content and submit for compliance approval in the platform.
- **Can I send Holiday emails through the new platform.**
 - The platform does offer the ability to schedule holiday messages. In addition, through the 'Automated Marketing' section, these can be automated. You will have to select the date that you want to schedule the messages.
- **Where do I find my custom created content?**
 - Users can save content by creating an email template. This template will show up in your content library. You will go to Filters / Author / You. In addition, you can "favorite" content created or not created by you and they will appear in the Filter / Favorite Only section.
 - AdTrax will not apply here because the content you create will be created on the platform. These items will go to compliance for review via the platform.
- **There is a lot of scrolling required to see all info on the Content landing page. Is there an easier way to find content?**
 - Content is categorized into Collections on like topics (i.e. Current Events, Holidays and Milestones, Retirement). In addition, there is embedded search and filter functionality in the platform that allows you to narrow your selections down. You can also "favorite" content for them to appear in the Favorite Only section.
- **What types of content can you "favorite" within the platform?**
 - The only form of content that you can "favorite" are articles.

EMAIL MARKETING

➤ FMG is sending me emails. What are there? Can I opt out?

- FMG sends out the following emails:
 - **Transactional Emails** – these are important transactional notification emails that users cannot Opt Out. These include:
 1. **Personal information:** These are sent automatically when a website visitor fills out the Personal Information Form to request that personal information not be sold, to request copies, and to delete.
 2. **New Lead:** These are sent automatically when a website visitor completes an FMG Suite form
 - a. Contact page form
 - b. Have a Question form
 - c. Lead Gen Popups/Sections form
 3. **Event Registration:** These are sent automatically when a website visitor
 4. completes an Event Registration form.
 5. **New Referral:** These are sent automatically when a website visitor fills out the Referral Campaign form to offer a new client referral
 - **Account Activity Notification Emails** – these are emails to notify users about specific activity on the account. These include:
 1. **Daily Digest – it is strongly recommended to NOT Opt out.** These are designed to inform you various types of activity on your account such as compliance approvals/rejections, new content added, new leads, new event registrations and more.
 2. **Campaign notifications** – this will enable Queued Emails. For more detailed information, see this [help article](#). You can Opt Out of these emails. (see below)
 - **Prospect and Customer Marketing Emails** – these communications vary and could include newsletters, campaigns, product updates and more. You can Opt Out of these emails. (see below)

➤ **How do I Opt Out of Account Activity Notification Emails? (Note: It is recommended to NOT Opt Out of Daily Digest)**

- There are **two places** the user needs to look at to opt in or out of notification emails from within their account.
 - **From Profile → Contact page** (also available from top right menu), the subscriber can choose to receive notifications to the Primary and/or Secondary email listed on their profile simply by selecting the "Receive email notifications" option under each.

Marketing Calendar Inbox Email History Drafts Compliance Equitable Tester, CA Lic. #4275412, AK Lic. #20... Impersonating: Stop

Preview Website

Profile
Content
Settings
Users
Sign Out

Contact Information

Primary Email

dennis.winton+eqh@fmg suite.com

☐ Receive email notifications

Secondary Email

dennis.winton+4006lnotifications@fmg suite.com

☒ Receive email notifications

- Under the **Settings page** (from the top right menu) is where they can select which notifications to send to the emails they've selected/entered - Daily Digest and/or Email Campaign notifications.
 1. If they would like to send notifications to some email other than what's on their profile, they can add that email address in the "additional email" box of the Settings.
 2. If they had selected the "Receive Email Notifications" in their Profile page, then that email(s) would show here as set to receive the notifications.
 3. If they select neither of the checkboxes on the Profile contact details, they would have to put some other email in the "additional email" box in Settings in order to receive the notifications they've selected.

Marketing Calendar | Inbox | Email History | Drafts | Compliance | Equitable Tester, CA Lic. #4275412, AK Lic. #20...

Impersonating: Stop

Profile
Content
Settings
Users
Sign Out

Email Notifications

Check the boxes below if you would like to receive email notifications. This includes the daily digest email, which is a useful summary of activity for the day.

☒ Yes, I would like to receive the Daily Digest email.

☒ Yes, I would like to receive Email Campaign notification emails.

Enter additional email addresses where you would like to receive email notifications.

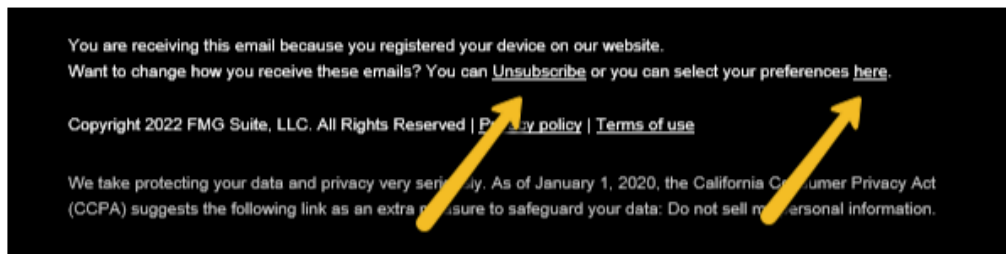
Enter email address(es)

The following email addresses are already receiving notifications:

Subscriber: dennis.winton+40061notifications@fmgsuite.com

➤ **How can users opt out of Prospect and Customer marketing emails?**

- You have the option to opt out of ALL marketing emails OR specific marketing emails by using one of the links at the bottom of the email.
 - To Opt Out of All Marketing Emails – select “Unsubscribe” link and then select “Unsubscribe from all communications” on the next screen.



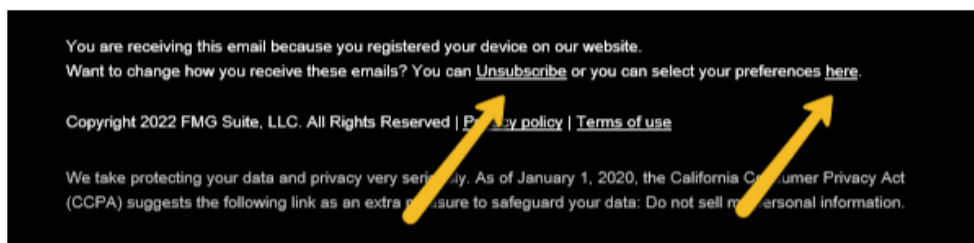
FMG

Subscription preferences

Unsubscribe [redacted]@equitable.com from all communication

Unsubscribe from all communication

- To Opt Out of Specific Marketing Emails – select “here” and then select the emails you want to opt out of on the next screen. Remember to click “Save preferences”



Subscription preferences

Select which lists 'bra*****@equitable.com' would like to receive communication from:

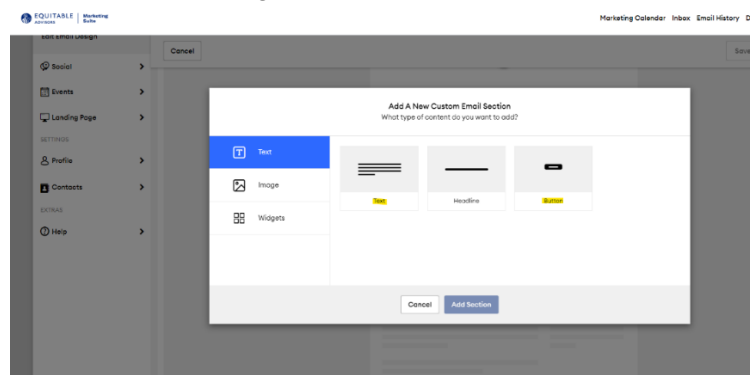
One to One One to One emails	☒
Customer Service Communication Receive feedback requests and customer service information.	☒
DIFM/Elevate Communication FMG Customer Communication and Messaging	☒
Timely Resources Get the latest resources such as timely client emails, plus eBooks, blogs, videos and more!	☒
Marketing Webinars & Events Stay up-to-date on our webinars covering marketing tips, best practices, and industry trends	☒
Monthly Newsletter A monthly roundup of announcements, marketing resources, and insights	☒
Product Releases & Announcements Get the latest on product releases, updates, and special promotions	☒

[Save preferences](#)

[Unsubscribe from all communication](#)

- **How do I locate the email templates after I save them?**
 - To find your templates, filter the content library, click "Author", and then click "You".
- **Can I have assistance with customizing an email and locating an image?**
 - Please review [FMG's Job Aide](#) on Email Customization.
 - The font is not customizable. Please review [FMG's Job Aide](#) to review on how to edit an email design.
 - We are working to create a Job Aide on how to add an image. When you click on the image it will bring up a menu. One of the options is titled "Unsplash". This contains a library of images you can select from.
- **Can I customize font and color of the boxes in the emails? Can I customize headlines and buttons?**
 - The font is not customizable. However, you can customize colors. Please review [FMG's Job Aide](#) to review what can be customized and how. Please also be sure that you are following Equitable's branding guidelines.
- **Are email templates and sequences customizable?**
 - These items can be customized. Please remember that edits will trigger a compliance review.
 - Please remember **content** can only be customized by PPG and higher financial advisors.
- **Can I change the subject or content in an approved email?**

- Content (including subject lines or salutations) can be customized. However, all edits to pre-approved content will trigger a compliance review.
- **When customizing an email template, can I show both the DBA and Equitable logos?**
- Co-branding is available. You will need to upload one image that has the co-branded logo. If you want both brands separate, you will create a profile for Equitable and a second one for the DBA. Please note that Equitable's branding guidelines are required to be followed.
- **Can we change the color of the call-to-action buttons from green to Equitable blue?**
- Yes, colors can be change. Please also be sure that you are following Equitable's branding guidelines.
- **Can an advisor re-subscribe a contact who has unsubscribed to an email?**
- If a subscriber is adding contacts via manual add or csv, the subscriber can resubscribe a contact in FMG.
 - If a contact is synching to Salesforce, the Equitable home office is catching all the unsubscribes from the FMG platform and is determining which Contacts are allowed to still be synchronized with FMG. As long as the home office allows the subscriber to continue synchronizing a contact to FMG, the subscriber has the ability to manually override an unsubscribe in FMG.
- **How can I add my calendar scheduling link (e.g. Cirrus Insights) to my signature block?**
- Currently calendar links are not available in the dynamic signature block within emails. However, you can add your calendar scheduling information to the body of an email by using either the button or text component and populating your unique scheduling link. *Please note that any changes made to pre-approved emails will create a compliance case. The project team is working with FMG to get field added to the signature block.*



EVENTS

- **Can I create and schedule events through the platform?**
 - Events can be created within the platform and can be publicized via email or connected through your integrated website. Please note that all events must go through Compliance review and approval.
- **If an advisor sets up an event and limits the number of contacts who can register, and it 'fills' after the second email has been sent - will it then not send the 3rd email?**
 - Currently there is no logic in the system to stop sending promotional emails when an event is full. (We have added this to our feedback channel).
- **Do you need to be at a certain level to create an event in the platform?**
 - All advisors can create an event within the platform. Please remember that you must follow current Compliance procedures regarding events: Submit via PinPoint to get BCM approval first otherwise the BCM will reject the event within the platform. Please refer to FB 17-101r.
 - Please review the "[Creating New Events](#)" video for more information.

Please review our [Program Microsite](#) for the Events QRC for additional questions.

GREETING CARDS

- **Does FMG have printed greeting cards that I can send to clients?**
 - Yes, FMG has a large array of physical greeting cards that can be customized and sent to your clients. For more information on using greeting cards, review this [reference guide](#).
 - As a reminder, Greeting Cards cannot have a **CTA (call-to-action)** and cannot request customer information.
- **Is there a cost for greeting cards?**
 - Yes, there is a cost to use the greeting card functionality. Greeting cards are priced at \$2.75/card. Bulk orders of 20+ cards are priced at \$2.25/card. Note that pricing is subject to change.
- **How do I pay for my greeting card order?**
 - *If you have a credit card already on file with FMG* then you will be charged at the beginning of the month for the prior month's usage.
 - *If you do not have payment information on file with FMG* then you will receive an email and/or phone call from the FMG support team who will collect a payment method from you so your order can be processed directly.

SALESFORCE INTEGRATION

- **Does the platform integrate with Salesforce?**
 - Yes. The platform allows you to synchronize clients and prospects from Salesforce.
 - Salesforce is the only CRM tool that is integrated. Other CRM integrations are not supported.
- **How do I select clients and prospects to synchronize from Salesforce?**
 - You will be able to synchronize records from a list view, or a report or from an individual client prospect record.
- **Will all of my Salesforce clients and prospects be eligible to synchronize?**
 - Eligible records must meet all of the following criteria:
 - be owned by the FP (prospect) or have an active service role on at least one contract (client or former client)
 - not be identified as email opt out
 - contain a valid email address
- **Can I synchronize my Salesforce leads?**
 - No, only client/prospect records can be synchronized
- **Can I add contact information from other sources?**
 - Yes, you can manually add contact records or upload a .csv file into the platform.
- **Will new website or event lead responses be fed back to my Salesforce?**
 - The lead response information will not feed into Salesforce to mitigate the risk of creating a duplicate. However, a contact record on the Marketing Suite platform will be created.

Please refer to the Salesforce Videos in the Resources to review the process of the Salesforce integration.

SOCIAL MEDIA

- **Does Marketing Suite replace Hearsay?**
 - No, it will not at this time. Hearsay Social will continue to be utilized in the near term to manage the majority of social media functionalities, including posting of original content.
- **Can I connect my social accounts?**
 - As part of account set up Hearsay users can connect their approved Facebook business page and/or their approved LinkedIn account to publish web content only via Marketing Suite. Please follow the steps in this job aide, which can be found on our [Program Microsite](#) page
- **How do I connect my social media accounts to Proofpoint Patrol?**
 - Please follow the [LinkedIn](#) and [Facebook Business](#) job aids.
 - Please note that only the advisor can connect their social media account(s). If the admin has CUR/delegate access, once the account is connected and compliance approved, that admin can support the connected social media account(s).
- **Once I connect my social accounts, is Hearsay turned off, or will it run concurrently?**
 - Once your social media account(s) are connected to Proofpoint Patrol, your Hearsay account will be disconnected within a week (7 calendar days). This will provide an opportunity for you to recreate any future dated posts within Marketing Suite.
- **Is there an additional charge for social media access within Marketing Suite?**
 - No, social media is part of your Marketing Suite tool which is part of your Digital Essentials Package.
- **I've already been supplementing my Hearsay social with Marketing Suite posts where it makes sense as I seem to have had access to this from the day, I got set up with Marketing Suite. A lot of the Marketing Suite content isn't available for social, though. How is this rollout changing that and increasing availability and amount of content?**
 - The current social capabilities were previously limited in marketing suite. This rollout will expand what you see and can use. It will expose the social content, and the connections needed to manage your social accounts. All future social activity will happen in marketing suite - not in Hearsay.

- **Will there be an app we can use for Social (as we have now with Hearsay)?**
 - Yes, we expect to open the app to advisors soon. Access to Marketing Suite will be available to Intune connected devices via the Advisor Mobile Portal (AMP) app. AMP is recommended for use on a tablet.
- **Can the system differentiate between someone's personal and business Facebook account?**
 - Yes, marketing suite will only be able to connect your business Facebook account.
- **Can multiple admins connect to a LinkedIn company page? Or is it just one connected through Marketing Suite, like Hearsay?**
 - If multiple admins have Change User Role (CUR) access to the Marketing Suite account where the social accounts are connected, they can all post to social from that account. However, the advisor needs to make the initial account connections. If you wish to limit your CUR users access to social media on the platform, you can do so through the user settings section.
- **Do we get an immediate email notification once compliance approves the profiles? Or do we need to login to Marketing Suite to manually check?**
 - You will receive an email from Proofpoint Patrol confirming the profile is approved. For more information on this process, please review the [Updating Social Media Profiles QRC](#).
- **How long should we expect an approval to take for a social profile update?**
 - The turnaround is quick, and you will get an E-mail notification once your profile has been approved or if it requires further adjustments, revisions, etc.
- **Why is my [Facebook / LinkedIn] account(s) showing as non-compliant?**
 - Your page is still being reviewed by compliance in Patrol. Once it has been approved, the status will change to 'Active', and you will receive a confirmation email from Patrol.
- **When do new advisors gain access to Marketing Suite?**
 - Generally new 14th or 20th Edition Financial Professionals get access to Marketing Suite within a week of being set up. This is handled via a weekly update process. If there is a business need for someone under a broker contract to get access, please request same via an email to advisormartech@equitable.com. Those requests are handled manually.
- **When will terminated Financial Professionals be removed from the Marketing Suite platform?**

- This is currently a two-to-three-week manual process. We are working now to automate the terminations process so these terminations are processed in a more expedient manner.

DBA

- **Does the social media rollout allow for DBA branding?**
 - Yes, you can create custom content using your DBA branding in the platform. If you have a Canva account, you can also use Canva directly through Marketing Suite to create custom social graphics that utilize your DBA branding.
- **If a DBA's Facebook Business page is connected to a staff's Facebook account, can any Advisor in our DBA connect to that DBA Facebook business page to post? Or does that staff member have to have their own Marketing Suite page to post to the business Facebook?**
 - Any member of the DBA can connect the staff-owned account in Marketing Suite, the main thing to be aware of is that the social media account owner's login credentials are needed to complete the connection, so they'll want to be sure to have those credentials available when connecting the DBA social accounts within the platform.
- **If a DBA group member wants to post the same custom post, will there be capability to share or duplicate for group members?**
 - There is currently no way to share custom social content in Marketing Suite across multiple group members. Each member needs to create the post directly within their individual Marketing Suite profile.
- **Is Marketing Suite able to notify us when we receive engagement on any of our social accounts (i.e. comments, likes, etc.)?**
 - No, you'll need to go directly to the social profile itself (natively) to see this information.
- **"How do we designate between a DBA LinkedIn post and an individual LinkedIn post when submitting?"**
 - Currently, you cannot select between your LinkedIn Company Page and LinkedIn Profile when posting from Marketing Suite. If you have a unique posting strategy for each social profile, please reach out to AdvisorMartech@equitable.com and we will work with you to determine the best approach for sharing content to your various accounts.

➤ **Is there a way to tell when the content was created so advisors can see if it is a timely piece?**

- Not currently. Content will have a visible 'New' or 'Updated' tag if it has been created or modified within the last 30 days, but you cannot see the specific creation date. This feedback has been provided to FMG.

CUSTOM CONTENT

➤ **How will the approval process work for custom content?**

- The content approval process will not change. It will follow the same process as it is today. Please refer to the [Custom Content Approval QRC](#).

➤ **Can you add a link to a customized social media post?**

- Yes, you can add a link within your customized social media post. As a best practice, ensure that when copying and pasting hyperlinks you include the <https://> or <http://> before the www. in the hyperlink to ensure your link preview appears in the post.

➤ **Is there pre-approved content or do we have to create it and get it approved?**

- The new tool offers pre-approved content. In addition, you can create custom content directly through the platform. Please note that social media business rules have not changed.

➤ **What is Canva?**

- Canva is a graphic design platform that offers tools for creating visual content, such as social media graphics.
- Canva is integrated within the Marketing Suite platform and can be used to look for images and create custom social media graphics. All imagery best practices and policies remain in place with this new tool.

➤ **If you are creating a post in Canva, does it get approved right through EAMS?**

- Yes, the Canva graphic will get approved as part of the post.

➤ **Is there Adobe Creative Suite functionality in addition to Canva or just Canva?**

- Currently, the only platform that is integrated with marketing suite for social posts is Canva. However, a user can create an image in any other platform and save it to their desktop and simply upload to marketing while creating the post.

➤ **Will I lose all my custom content (posts) scheduled in Hearsay to post to my LinkedIn and/or Facebook business page?**

- Yes, once you successfully connect your social accounts to Marketing Suite your Hearsay access will be turned off. To ensure you do not lose any of your pre-scheduled posts in Hearsay, you will want to identify what has not already been posted and recreate the posts in Marketing Suite.
- **In the past on the Hearsay platform, we were given warning that a post required approval based on words that weren't compliant. You had the chance to change the wording and then make it compliant. Now that isn't happening, and the post sits in review. Is there any fix for this?**
 - This feature is not currently available in Marketing Suite. Our compliance partners have done a spectacular job building logic into the Proofpoint Patrol Lexicon which will streamline the review process in most cases. Be sure to post at least 24 hours prior if you need something posted by a certain time.
- **For custom posts, can I edit them after they've been compliance approved?**
 - If your post is still awaiting compliance review, then you can retract and edit. If it is already scheduled, you can look under Social Media > Shared and Scheduled and edit it, then resubmit.
- **How do I ensure my assistant is also receiving the post rejection notifications from compliance?**
 - You'll need to ensure your assistant is delegated access via change user role (CUR) in your Marketing Suite Profile. Then, admins can receive these notifications as long as they are copied on the advisors' daily digest emails. Please review the knowledge base article on [setting up admin notifications](#).

POSTING

- **Hearsay had 3 suggested posts each week that you could add to the calendar with one click. Will that be available?**
 - The platform currently offers one automation and multiple social sequences, which you can choose and then look at timing in between.
- **Once we post something from the Social Post Library will it have a message showing that we have already posted that piece to help us not post the same piece twice?**
 - This notification is unavailable today, but we are working with FMG on this.
- **Do we need to leave links in the post for a pop up as an embedded preview on platforms?**

- It will depend on the link. In some cases, you will see it pop up and then you can remove it because it is already embedded.
 - **TIP:** Always type in the full hyperlink (https://) when adding to a social post, otherwise the preview may not appear.
- **Can we post videos?**
- Yes, you can link videos. You will want to make sure that they are compliance approved by using the video template. Once approved in AdTrax, you can host it through a video hosting platform such as Vimeo, turn off comments on the video, and then link the approved, hosted video through Vimeo within your social post.
- **Will there be a calendar view for scheduling the recommended best times to post?**
- You can see upcoming scheduled content from within the 'Marketing Calendar'. Within this view you will see scheduled emails as well as social posts.
 - You can also view upcoming social posts from within the Shared & Scheduled tab in the Social Media section.
 - As far as recommended best times to post, that functionality does not exist yet in platform.
- **I tried to schedule a post, but the platform will not allow the post to go through.**
- Until you have connected your social media profiles, you cannot schedule or post any content. There are prompts to connect when attempting to do this. If you are connected to social media and the post still did not post, then please ensure that the post was pre-approved. Otherwise, it is being reviewed by compliance.
- **How can we pull down a post? Is there a place to see reporting on posts?**
- You can do this via the [shared and scheduled section](#). FMG social reporting is not available through the platform today, but we have a high-fidelity commitment from FMG to enable this capability soon. Our best practice recommendation is to review social post metrics directly through the social platforms as they provide the most comprehensive metrics available on activity and reach.
- **Why did a social content that I set to post immediately take 24 hours to go live?**
- Make sure the post was already pre-approved. If this is the case, then the post will go live on your social account right away. However, if it was not already approved and/or you made any edits, then it will first go to compliance for review and approval.

- **If I have existing scheduled posts in Hearsay for the next few days, will those still go out or do I need to repost them in Marketing Suite?**
 - Once we disconnect you from Hearsay any scheduled posts you had on that platform will not go out. You will need to take note of those posts and then re-set them up, as you like, in Marketing Suite.
- **Since the accounts are surveilled by Proofpoint when we make a post does branch compliance need to approve the posts?**
 - Pre-approved posts will not go through compliance and will post directly.
 - Custom content posts will be reviewed and approved by the Advertising Compliance Team; there is no change to this procedure.
 - Social Media profiles will be reviewed and approved by Regional Controls.
- **With Hearsay, it would not let me go back in and edit a post once it was posted. With Marketing Suite, will it allow us to go back and edit a post once it is posted or will it be posted for good like Hearsay?**
 - Once something is posted, you will not be able to go back and edit. Best practice is to delete the post if changes are necessary and then go back to Marketing Suite to recreate the post.
- **Do any social media posts go straight through, or do they ALL have to go through compliance?**
 - Yes—we have a vast collection of pre-approved content which will not be stopped for compliance review. Additionally, if you post something considered benign to our Proofpoint Patrol Lexicon, your post will bypass compliance as well.
- **Can I share a post?**
 - You cannot share posts natively on a social platform. You can, however, copy the link to the post from the social platform and then create a custom post linking to it in Marketing Suite.
- **If we want to change the date of something already scheduled, will we have the availability like in Hearsay where you can change the date, or do we just have to resubmit the post?**
 - Yes, you can edit the date you've scheduled a post by going to the 'Shared and Scheduled' page, locating your post, scrolling to the right, then clicking on the 'Edit' button.
- **How can I tell if my automation is set up properly and working?**
 - Under the automations tab, locate the automation in question. If it is toggled on you will see it listed in the 'Active' section. You can then click into the 'Configure'

link to determine which accounts the automation will post to and on what days of the week you'd like the automation to post. Please review the knowledge base article on [automations](#).

- **Am I able to add a LinkedIn Poll or is that not compliance approved?**
 - No this is not compliance approved because the polling feature needs to be used natively on LinkedIn and our new surveillance system cannot monitor this feature.
- **Can you tag other social accounts when creating custom content in Marketing Suite?**
 - No, you'll need to do this natively in the social media platform. Just tag the person and do not edit the post itself to do so.
- **Are Collections strictly for E-mail marketing?**
 - No, Collections now include Social Media posts.
- **If I don't like one of the posts in a Sequence can I delete them?**
 - Yes. This [knowledge base article](#) can walk you through the steps. Please note, you will need to be logged into EAMS to access the article.
- **After submitting a social sequence for posting, will a compliance review be triggered if I edit the date?**
 - No, changes to the date or time will not trigger a review. However, if you edit the social content itself, that will trigger a compliance review.
- **Can I turn off one post of an automation?**
 - Yes, in the social foundations automations you can adjust your content under the configure section.
- **What time do the posts within social sequences post during the day?**
 - They'll send at whatever time was selected for the first post. If 10:30am was selected for the first post, then each subsequent post will be sent at 10:30am.
 - If selected to send ASAP, then they would all be sent at the same time as the first post published on the selected date.
- **Can I post photos that I have taken at events?**
 - Yes. The business rules remain the same in posting pictures. All Equitable events have provided photo permissions for Equitable FPs and employees. If you are posting photos of minors and/or external people, you will be required to obtain a photo release.

➤ **Are there Campaigns in Marketing Suite we can post, like in Hearsay?**

- Yes, although the terminology is different. Marketing Suite utilizes Sequences which are a series of posts. There are two places in Marketing Suite to find these: the Automated Marketing tab in the left-hand menu and within the Content Library.
- The automations found in Automated Marketing are considered 'Push'. You can opt into these automations and the social posts will automatically go out on your behalf.
- The Sequences in the Content Library are found either by searching for a topic or by clicking 'Social Posts'. Then, click 'Filters' in the top right corner of your screen and check the 'Social Sequences' box to view.

WEBSITES

➤ **Do all Financial Professionals get a website?**

- No, not by default. All financial professionals will get access to a branded landing page in FMG. Full websites are available at an additional cost to financial professionals.

If you are interested in learning more about building a website with FMG, please visit our [program microsite](#) for pricing and eligibility.

➤ **I currently have an approved off-platform website? Can I keep it?**

- Yes, you can keep your off-platform website and still leverage some of the Marketing Suite capabilities in FMG.

However, if you are interested in migrating your off-platform website to FMG, please review the [off-platform website migration guide](#) for more information on the process and benefits of switching website vendors.

➤ **I currently have a website on FMG, can I keep it?**

- Yes, we will be moving all EQH subscribers that were previously using FMG as an off-platform website vendor into our new Enterprise program. Once you have been moved into our Enterprise program, you will no longer be considered an off-platform exception.

➤ **When can I migrate my website if I am currently off-platform?**

- Off-platform website owners are eligible to migrate to FMG starting in early 2024. If you have any questions about this process, please see the [off-platform website migration guide](#) for more information.

➤ **I do not currently have a website but would like to build one – how do I request this? What is the cost?**

- If you are interested in building a new website with FMG, please visit the [program microsite](#) for more information on pricing and to request a demo of FMG's website capabilities.

➤ **Can I receive email notifications for forms submitted on my website?**

- Yes, you can opt-in to email notifications for website form submissions by ensuring the 'Receive email notifications' text box is checked on your profile under the Contact Information tab.

WEBSITE MIGRATION

➤ **Is there a cost to migrate my website from Broadridge to FMG?**

- There is no cost to migrate your website to FMG. All migration costs are being covered by the Home Office.

In late 2024, we will communicate with website migration subscribers around the process of transferring website billing fees direct to the website owner.

➤ **Will my current website be automatically turned off once my new website is live?**

- Unfortunately, it will not. Due to Broadridge website owners being directly contracted with the vendor, each website owner will need to submit a request to Broadridge directly to cancel their current website subscription.

➤ **How do I cancel my current website subscription with Broadridge?**

- To cancel your current subscription, call 800-233-2834 or email Broadridge client support team at BAS.ClientSupport@broadridge.com. 30 days' notice is required to suspend recurring automated billing.

If you have pre-paid for an annual subscription, you will receive a pro-rated refund for the months of service that you have not used at time of cancellation.

MORE QUESTIONS ON WEBSITES?

- [Please review the Off-Platform FAQs, Website FAQs, and Website Best Practices for additional information](#)

MISCELLANEOUS

➤ **What type of communications are generated within the platform?**

- You will be notified by email immediately of event registrations and contact requests. Further details can be found in your inbox.
- Each evening a daily digest summary email is generated that outlines all notifications and compliance activities from that day. Although you can opt out of this email, it is recommended that you do not as it contains valuable status information.

- All users will be opted in to receive general marketing emails from FMG. These emails contain general information to all customers of the FMG platform such as enhancements and content changes. You will be able to opt out and unsubscribe to specific types of emails if desired.

RESOURCES

- Equitable Advisors Marketing Suite resources are found resources are located on EAVU (Digital Tools>Equitable Advisors Marketing Suite) and on the [Program Microsite](#).