



QRC – Updating Social Media Profiles

Equitable Advisors Financial Professionals & authorized branch personnel who wish to use LinkedIn Profiles & Facebook Business Pages for business purposes must enroll in Marketing Suite & Proofpoint Patrol which ensures Equitable Advisors to comply with company policy and meet existing regulatory obligations. Proofpoint Patrol is the platform for social media supervision.

Please use the job aide below to walk you through how to update your LinkedIn profile and or your Facebook Business Page.

NOTE: LinkedIn Company Page Profile updates will be submitted via the LinkedIn Page Template (AdTrax)

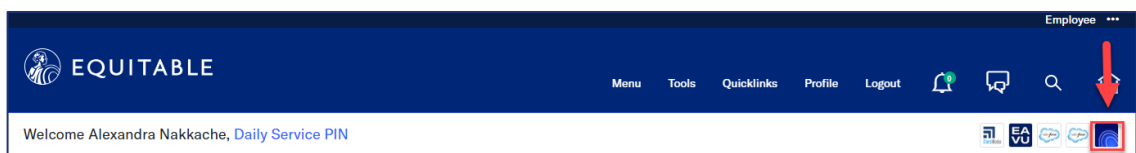
Please read through the guidance carefully. For existing social media business pages, please follow the guidance outlined below.

NOTE: Almost all social media profile updates can be completed within Marketing Suite & Proofpoint Patrol.

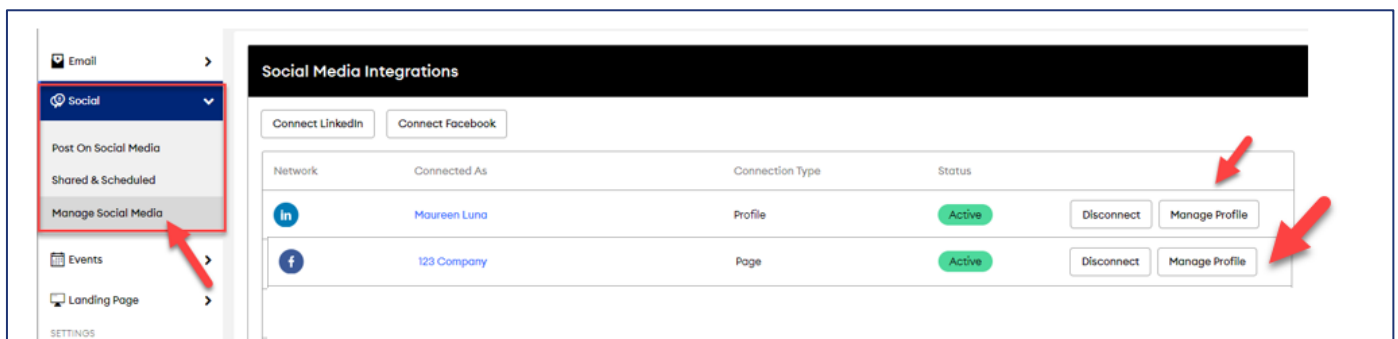
Please follow the steps outlined in the QRCs below which provide detailed instructions and guidance on all LinkedIn and Facebook Business Page fields.

- LinkedIn Profile Fields QRC
- Facebook Business Page Profile Fields QRC

1.) Login to the **Equitable Company Portal** and launch **Equitable Advisors Marketing Suite**



3.) Select **Manage Social Media** and select the specific social media you wish to update





4.) Please select the specific social media you wish to update and select **Sign In** to the specific social media account.

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Profile Submission

Hello,

Any update to your profile must be reviewed and approved before displaying it to the public. To start the process, please select a social network from the list below. Upon successful validation of your credentials for that social network, you may enter your update into the provided form. You may enter multiple updates. When finished, press the "Submit Changes for Review" button to initiate the review process. You will receive an email summary when the review process is complete.

 [Sign in to Facebook](#)

 [Sign in to LinkedIn](#)

NOTE: You may be required to re enter your social media profile username/email address and password

5.) Please select **Update Your Profile**

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Profile Submission: Maureen Luna

[Back to Sign In](#) [Update Your Profile](#)

 LinkedIn Profile for Maureen Luna

Last Updated: 7/8/24
Profile will expire in 2 months (10/6/24)

6.) Your current social media profile information is displayed as it appears publicly on your social media profile(s). You will select the **Pencil** icon next to the specific field you wish to edit/make changes.

NOTE: For more comprehensive social media profile fields guidance, please follow instructions on LinkedIn Profile Fields QRC and/or Facebook Business Pages Profile Fields QRC,

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Edit Profile: Maureen Luna

[Back to Sign In](#) [Add Profile Section](#) [Submit Changes for Review](#)

 LinkedIn Profile for Maureen Luna

Last Updated: 7/8/24
Profile will expire in 2 months (10/6/24)

Sections	Section Value
Profile Images	
Profile Photo	 
About	
Summary	
Education	New York University, Bachelor of Arts - BA in Biology, General



EQUITABLE
ADVISORS

**Marketing
Suite**

7.) By clicking the Pencil icon, please add your proposed profile updates into the desired field(s) and click **Save**.

Edit Profile Photo

Choose Image

Remove Image Cancel Save

Edit Headline

Account headline

Director at Equitable Advisors

Cancel Save

8.) You will be able to preview your proposed social media profile updates below.

NOTE: Profile field information you delete will be crossed out and in **Red**. New information added will be displayed in **Green**.

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Edit Profile: Maureen Luna

Back to Sign In Add Profile Section Submit Changes for Review

ⓘ FYI: Unsubmitted profile edits will be cleared in 8h 44min. New sessions begin midnight Eastern Standard Time.

LinkedIn Profile for Maureen Luna

Last Updated: 7/8/24
Profile will expire in 2 months (10/6/24)

Sections	Section Value
Headline	Director at Equitable Director at Equitable Advisors
Industry	Financial Services
Geo Location	Manhattan, New York, United States
Contact Info	
Profile URL	maureen-luna-41981311
Email Address	maureen.ogady@equitable.com (primary)
About	
Summary	Maureen has spent the last 27 years in the financial services industry specializing in both business and personal financial planning issues.
Education	New York University, Bachelor of Arts - BA in Biology, General. Activities and societies: Pre Law Society
Education	St. Joseph's University



9.) If you want to enter a new field that is not currently on your social media profile(s) please select **Add Profile Section** and select the specific field you wish to add.

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Edit Profile: Maureen Luna

Back to Sign in

Add Profile Section

Submit Changes for Review

FYI: Unsubmitted profile edits will be cleared in 8h 44min. New sessions begin midnight Eastern Standard Time.

LinkedIn Profile for Maureen Luna

Last Updated: 7/8/24
Profile will expire in 2 months (10/6/24)

Sections

Section Value

Profile Images

Profile Photo

Intro

First Name: Maureen

Last Name: Luna

Additional Name

Address

Background Photo

Birthday

Courses

Education

Experience

Honors & Awards

Instant Messenger

Languages

Licenses and Certification

Organizations

Patents

Phone

Projects

Publications

10.) Once you have added all of your proposed social media profile changes please select **Submit Changes for Review**

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Edit Profile: Maureen Luna

Back to Sign in

Add Profile Section

Submit Changes for Review

FYI: Unsubmitted profile edits will be cleared in 8h 44min. New sessions begin midnight Eastern Standard Time.

LinkedIn Profile for Maureen Luna

Last Updated: 7/8/24
Profile will expire in 2 months (10/6/24)

Sections

Section Value

Headline: Director of Equitable
Director of Equitable Advisors

Industry: Financial Services

Geo Location: Manhattan, New York, United States

Contact Info

Profile URL: maureen-luna-44191211

Email Address: maureen.ogrody@equitable.com (primary)

About

Summary: Maureen has spent the last 27 years in the financial services industry specializing in both business and personal financial planning issues.

Education: New York University, Bachelor of Arts - BA in Biology, General, Activities and societies: Pre Law Society

Education: St. Joseph's University

11.) Please select **Continue**

Submit Changes for Review

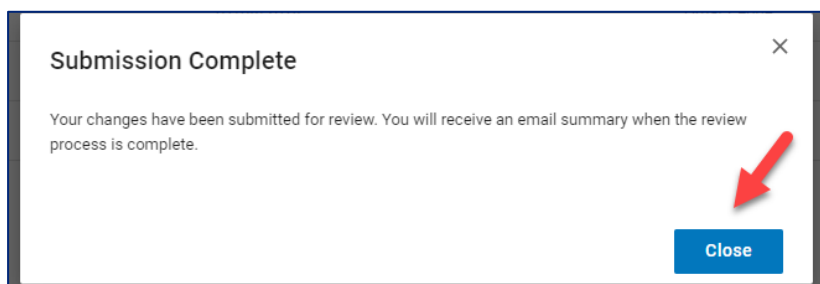
Your updates will be reviewed before they are published. You can continue to submit changes to your profile until a reviewer starts the review.

Cancel

Continue



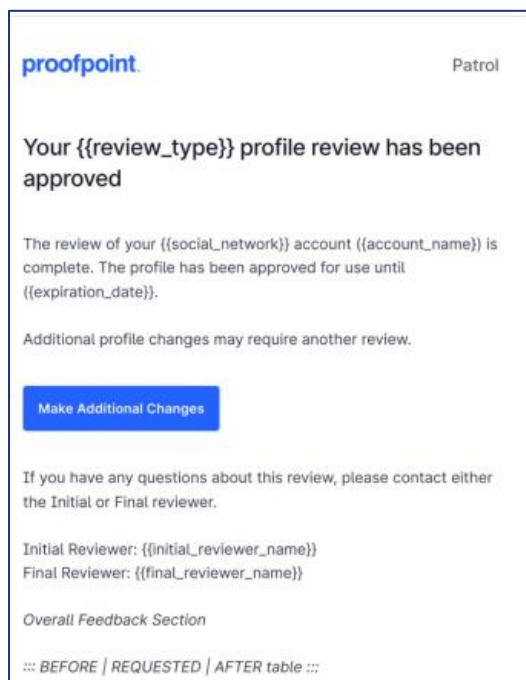
12.) Your social media profile fields will now be routed to Regional Compliance for Review. Select **Close**



13.) You receive an email notification once your proposed profile field(s) have been reviewed and any action needed,. You will see the status in the subject of the email and the status of the approvals on the left navigation. You also can access the **Proofpoint Patrol Profile Manager** by select the link in the email notification.

Below is a screenshot of an example of a profile review which has been **Approved**.

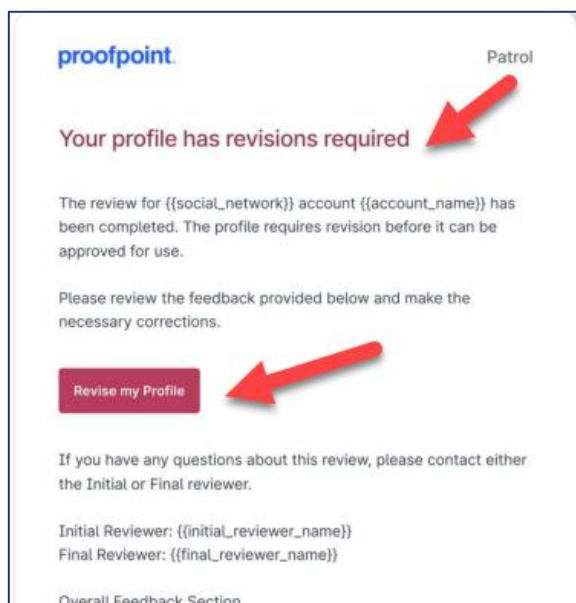
NOTE: Once these changes have been approved, they will appear live on your social media profiles.





The below screenshot is an example of a profile review which **Required Revision**

You also can access the **Proofpoint Patrol Profile Manager** by select the link in the email notification to make the required revisions



READY TO LEARN MORE?

Visit our program microsite: www.equitable.fmgsuite.com

Contact FMG Support: Equitable@fmgsuite.com or (858) 500-5479

Contact MarTech Project Team: AdvisorMartech@Equitable.com