



QRC – Facebook Business Page Profile Fields

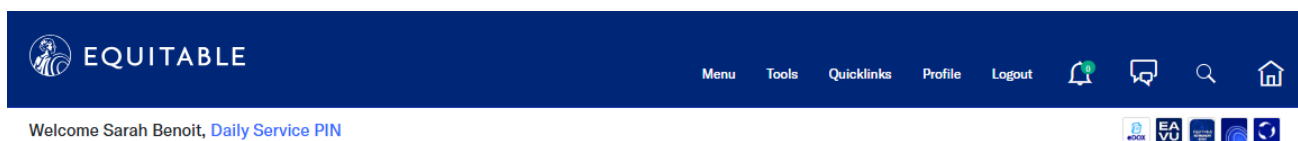
Please use the job aid below to compose your Facebook Business Page via Marketing Suite & Proofpoint Patrol. Please read through the guidance carefully to ensure your profile contains all required and compliant information. Equitable Advisors Financial Professionals & authorized branch personnel using Facebook Business Pages for business purposes must enroll in Marketing Suite & Proofpoint Patrol. This ensures Equitable Advisors comply with company policy and meet existing regulatory obligations. Proofpoint Patrol is the new platform for social media supervision (replacing Hearsay Social).

- For existing Facebook Business Pages, please follow the guidance outlined below.
- For new users creating a Facebook Business Page follow the guidance outlined below. Once the page is created, please follow the steps outlined in the Connecting Social Media Accounts-QRC.

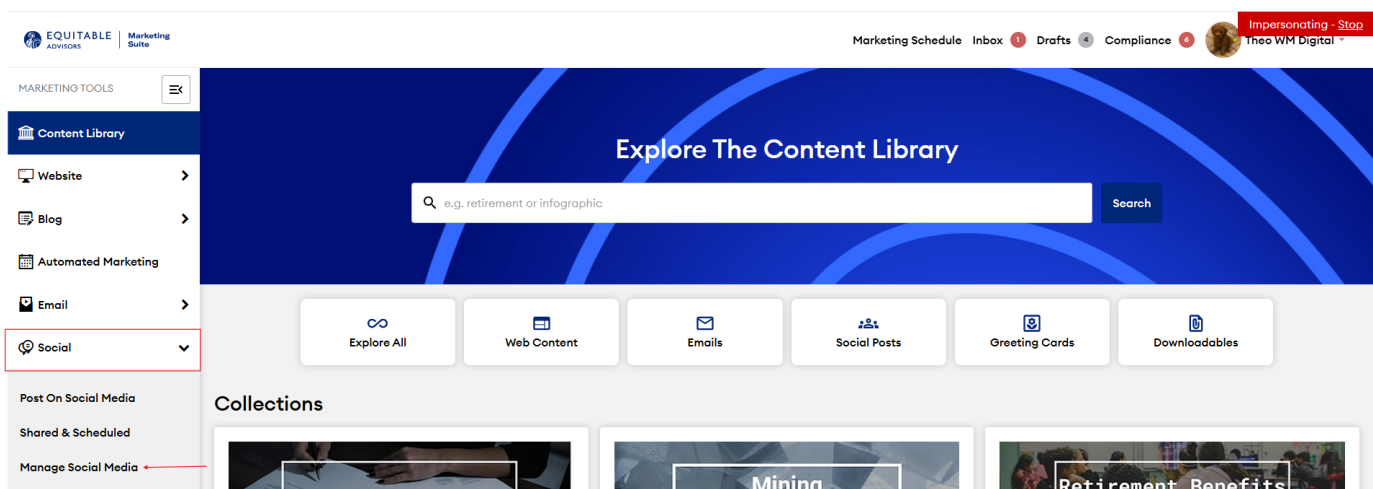
Important Considerations: Facebook Business Page features are PROHIBITED until Equitable Advisors expressly approves the new feature(s)

Please read through the guidance carefully to ensure your profile contains all required information and is compliant with company and regulatory standards. Most social media profile updates must be completed within Marketing Suite for Facebook Business Pages. For those updates that can only be done natively in Facebook, please refer to the Appendix for guidance.

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



2.) Navigate to the **Social** Tab on the Left Toolbar





3.) Select Manage Social Media and select Manage Profile next to your Facebook Business Page (if not already connected)

Network	Connected As	Connection Type	Status	Proofpoint Status	Actions
LinkedIn	Maureen Luna	Profile	Active	Approved	Disconnect Manage Profile
Facebook	123 Company	Page	Active	Approved	Disconnect Manage Profile

NOTE: You may be required to re enter and/or Sign in to your Facebook Business Page.
Please have your username/email address and password available

Equitable Advisors Marketing Suite will ONLY connect your Facebook Business Page.
It will not access your personal Facebook profile.

4.) Many Facebook Business page fields are optional. Please use the appropriate fields to complete your Facebook Business Page. If you want to enter a new field that is not currently displayed on your social media profile(s) please select **Add Profile Section** and select the specific field you wish to add.

Back to Sign In Add Profile Section Submit Changes for Review

FYI: Unsubmitted profile edits will be cleared in 11h 24min. New sessions begin midnight Eastern Standard Time.

Facebook Page for S. Mary Gilbert Financial Group

Last Updated: 4/11/23

Sections Section Value

Profile Images

Cover Photo

Profile Image

About

Name S. Mary Gilbert Financial Group

5.) Your current Facebook Business Page information is displayed as it appears publicly on your live page. You will select the **Pencil** icon next to the specific field you wish to edit/make changes.

Back to Sign In Add Profile Section Submit Changes for Review

FYI: Unsubmitted profile edits will be cleared in 9h 52min. New sessions begin midnight Eastern Standard Time.

Facebook Page for 123 Company

Last Updated: 6/24/24
Profile will expire in 14 days (8/15/24)

Sections Section Value

Profile Images

Cover Photo

Profile Image



EQUITABLE ADVISORS

Facebook Business Page Fields

Profile Image - This field must be updated natively on Facebook

For Individual Facebook Business Pages, we recommend using your latest professional headshot.

Headshot photo best practices:

- Find a great background – that can be a professional setting, a neutral-colored wall, or lush outdoor location
- The photo should just be of you – you do not want partially cropped sections of other people in your portrait
- Wear appropriate clothing – business or business casual attire is best.
- Updating your headshot – get a new headshot every other year. You want to make sure your headshot accurately reflects your brand and stays looking modern and fresh.

For Producer Group Facebook Business Pages, we recommend using your approved DBA logo.

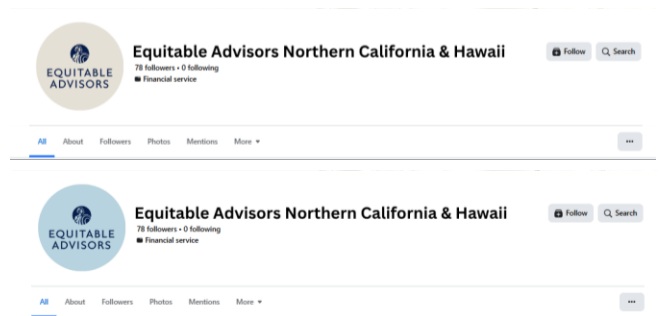
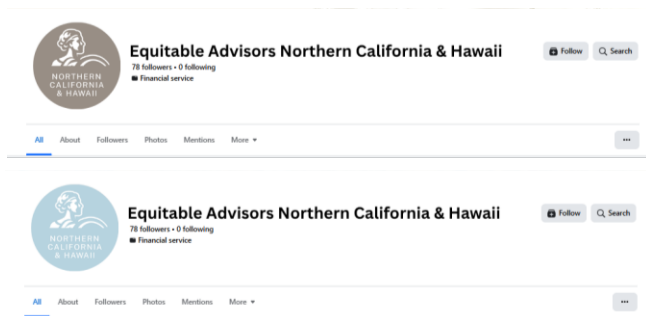
Note: no promissory pictures, upward charts, etc. is allowed per AdC guidance. This applies for both DBA logos and cover photos.

DBA logos must not contain promissory graphics (examples include: upward trending arrow/ line/ column/ percentage of rates; money/currency, gold coins, gold bars). If you are uncertain about a logo please contact AdC reviewer for assistance.

For Branch Facebook Business Pages, you must use either your branch-specific profile bug or the standard Equitable Advisors option, as shown below

Branch Specific

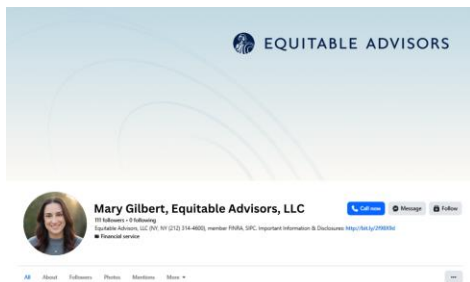
Equitable Advisors Generic



Cover Photo - This field must be updated natively on Facebook

For Individual Facebook Business Pages - If using Equitable Advisors branding, you must use one of the three options shown below. No alternate use of Equitable Advisors or Equitable only branding is allowed.

If using your DBA branding, be sure your cover photo does not contain promissory graphics (examples include: upward trending arrow/ line/ column/ percentage of rates; money/currency, gold coins, gold bars, etc.)





EQUITABLE ADVISORS

Facebook Business Page Fields (Continued)

Cover Photo (continued)

For Producer Group Facebook Business Pages - If using your DBA branding, be sure your cover photo does not contain promissory graphics (examples include: upward trending arrow/ line/ column/ percentage of rates; money/currency, gold coins, gold bars, etc.)

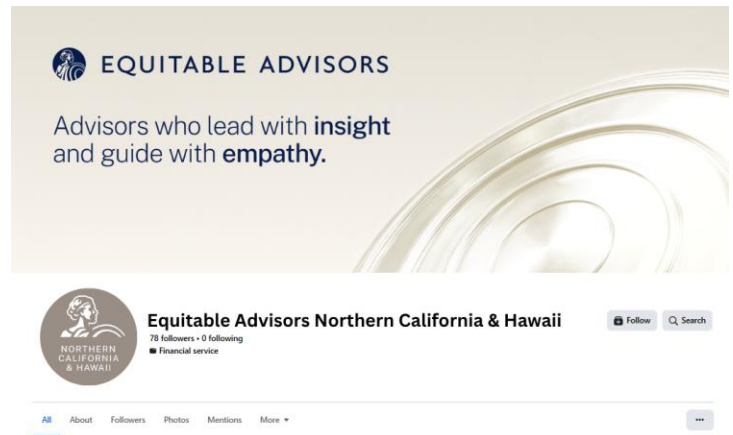
If you would like to co-brand with Equitable Advisors and need assistance with creating a co-branded lockup of your logo, please submit a request via brand@equitable.com.

For Branch Facebook Business Pages, you must use either your branch-specific cover photo or the standard Equitable Advisors option, as shown below

Branch Specific



Equitable Advisors Generic



Name - This field must be updated natively on Facebook

Facebook enables you to create a customized Facebook page name. Character limit is 75 characters. Please see below examples The field can only be updated natively on Facebook. To create and or change your page name, please follow instructions in the Appendix.

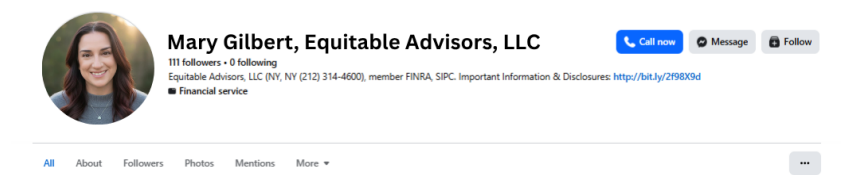
Approved Pages Names Below:

- [Your name], Equitable Advisors Financial Professional or Financial Advisor or Financial Planner
- {Your name} Financial Consultant (if IAR registered Series 65 or 66)
- [Your name], Financial Professional
- [Your name], Equitable Advisors, LLC
- [Your name], [approved DBA name]
- [Approved DBA name]
- [Approved DBA name with Equitable Advisors, LLC]
- [Branch name], Equitable Advisors, LLC (Branch managers only)

About

Name

S. Mary Gilbert Financial Group





EQUITABLE ADVISORS

Facebook Business Page Fields (Continued)

Privacy and Legal Info Impressum/About You

You must add ALL applicable Disclosures in the Impressum / About You Section.

Mandatory Kitchen Sink Default Disclosure.

This disclosure must be included for all Facebook Business Pages.

NOTE - All InMail, e mail and other electronic individual and group communications sent to and received from this SOCIAL MEDIA page are subject to capture, review and archive by Equitable Advisors, LLC and to possible production upon regulator request for review. Duly registered and licensed representatives offer securities through Equitable Advisors, LLC (NY, NY (2 12) 314-4600) member FINRA, SIPC (Equitable Financial Advisors in MI & TN), offer investment advisory products and services through Equitable Advisors, LLC, an SEC-registered investment advisor, and offer annuities and insurance through Equitable Network, LLC, (Equitable Network Insurance Agency of California, LLC; Equitable Network Insurance Agency of Utah, LLC; Equitable Network of Puerto Rico, LLC). Equal Opportunity Employer - M/F/D/V. All companies are affiliated and do not provide tax or legal advice. For financial professionals conducting business in the state of New York who hold one or more of the following designations and title respectively, please see Important Information & Disclosures in the link below: CASL, RICP, and CRPC professional designations, and RETIREMENT PLANNING SPECIALIST title. Important Information & Disclosures: <https://bit.ly/2f98X9d>

NOTE: Previous approved kitchen sink disclosure is permitted to use. The default disclosure above is the 2024 NEW shortened version.

For a full list of additional Disclosures please reference the Equitable Advisors Social Media Disclosures QRC. If any of these disclosures do apply, please add to Facebook Business Page.

Privacy and Legal Info	
Impressum	All Facebook Messenger, e-mail and other electronic individual and group communications sent to and received from this Facebook page are subject to capture, review and archive by Equitable Advisors, LLC and to possible production upon regulator request for review. Links to third-party media articles and/or websites are for general information purposes only and do not constitute an offer or solicitation of any kind. They are not intended, and should not be relied upon, as insurance, investment or financial advice. No representation as to the accuracy or completeness of any statements, statistics, data, opinions, forecasts, or predictions provided in any third-party article and/or website content is intended or should be inferred. Duly registered representatives offer securities through Equitable Advisors, LLC (NY, NY (212) 314-4600), member FINRA, SIPC (Equitable Financial Advisors in MI & TN) and offer investment advisory products and services through Equitable Advisors, LLC, an SEC-registered investment advisor. Duly licensed agents offer annuities and insurance, including those of Equitable Financial Life Insurance Company (NY, NY) (Equitable Financial) and Equitable Financial Life Insurance Company of America (Equitable America) (an AZ stock company with main administrative office in Jersey City, NJ) respectively, through Equitable Network, LLC, (Equitable Network Insurance Agency of California, LLC, in CA; Equitable Network Insurance Agency of Utah, LLC, in UT; Equitable Network of Puerto Rico, LLC, in PR). Equal Opportunity Employer - M/F/D/V. All companies are affiliated and do not provide tax or legal advice. For financial professionals conducting business in the state of New York who hold one or more of the following designations and title respectively, please see Important Information & Disclosures in the link below: CASL, RICP, CRPC, RETIREMENT PLANNING SPECIALIST title Important Information & Disclosures: http://bit.ly/2f98X9d

If approved for DBA the DBA disclosure and/or California or Arkansas current life insurance numbers must be listed. Please add.

DBA ONLY – Add the following line with your DBA Name

[APPROVED DBA NAME] is not owned or operated by Equitable Advisors or Equitable Network

Please insert CA Insurance/AR Insurance-if applicable

Title + [CA License # _____] [AR License# _____]

Intro / About You

About section. Add a brief summary of your page (255-character limit.)

Add About You

About You

Mary Gilbert is a seasoned Financial Professional with over 20 years of experience in Financial Services.

Cancel

Save



EQUITABLE ADVISORS

Facebook Business Page Fields (Continued)

Phone Number

About section. Add a brief summary of your page (255-character limit.)

Phone Number	+14135309102
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Category - This field must be updated natively on Facebook

Select **Financial Service**. Only select Financial Planner only if you are a Certified Financial Planner and have the appropriate licenses/registrations, and Financial Consultant if that is your company approved title. Do NOT select Finance Company or Financial Aid Service.

To update, please follow instructions in the Appendix.

Subcategory

To update, please follow instructions in the Appendix.

Add Subcategory

Cancel

Save

Email - This field must be updated natively on Facebook

Must be your Equitable Advisors approved primary e-mail. DO NOT LIST PERSONAL EMAIL ADDRESSES.

To change your email address natively on Facebook, please follow instructions in the Appendix.

Email	mgilbert@equitable.com
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Address - This field must be updated natively on Facebook

Please enter your Equitable Advisors or approved DBA business address.

To change your address natively on Facebook, please follow instructions in the Appendix.

 Address	1290 Avenue of the Americas, Springfield, MA 01104, United States
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Link (Username) - This field must be updated natively on Facebook

The Business Page URL (Username) field can only be updated natively on Facebook. When choosing your custom URL consider the following:

- **For Individual Facebook Business Pages**, we recommend using your name and Equitable Advisors:
<https://www.facebook.com/FirstName-LastName-Equitable-Advisors>
- **For Producer Group Facebook Business Pages**, we recommend using your approved DBA name:
<https://www.facebook.com/Approved-DBA-Name>
- **For Branch Facebook Business Pages**, we recommend using the full branch name:
<https://www.facebook.com/Equitable-Advisors-BranchName>

To change your Profile URL natively on Facebook Business Page, please follow instructions in the Appendix.



Facebook Business Page Fields (Continued)

Website

Please enter your Website URL. This is your Equitable Advisors approved website URL. This could include the link to www.equitable.com, www.equitableadvisors.com, your approved Marketing Suite (FMG) website or landing page, your approved LinkedIn profile, or another Equitable approved website.

Website	https://www.mgfg.com/
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Settings

Page Settings: Users can message: True

To allow or not allow users to message you on your Facebook Business Page please check this box or leave this box unchecked and select Save. Reminder: All messages are surveilled and archived.

Page Settings	Users can message: true
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Page Settings: Allow people and other Pages to tag: False

To allow or not allow users to tag you on your Facebook Business Page please check this box or leave this box unchecked and select Save

Page Settings	Allow people and other Pages to tag: false
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Business Always Open - This field must be updated natively on Facebook

To change your Facebook hours, natively on Facebook, please follow instructions in the Appendix.

Business Permanently Closed - This field must be updated natively on Facebook

To change your Facebook hours, natively on Facebook, please follow instructions in the Appendix.

Page is Reviewable

Facebook Reviews are prohibited. You must switch the functionality off natively on Facebook.
Please follow instructions in the Appendix.

 Page is Reviewable	false
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EQUITABLE ADVISORS

Once you have completed all of your changes, please choose **Submit Changes for Review.**

proofpoint Digital Risk & Compliance

Edit Profile: S. Mary Gilbert Financial Group [Back to Sign In](#) [Add Profile Section](#) [Submit Changes for Review](#)

FYI: Unsubmitted profile edits will be cleared in 12h 13min. New sessions begin midnight Eastern Standard Time.

Facebook Page for S. Mary Gilbert Financial Group
Last Updated: 4/21/25

Sections	Section Value
> Profile Images	
> About	
> Privacy and Legal Info	
> Contact and Basic Info	
▼ Settings	
✕ Username	marygilbertfg
Page Settings	Users can message: true

Your changes will be reviewed by Regional Compliance Team. You will receive an [email notification](#) notifying you of the status of your profile changes, please see linked QRC for example.

You also can access the **Proofpoint Patrol Profile Manager** by selecting the link in the email notification.

Additional Facebook Business Page features are PROHIBITED until Equitable Advisors expressly approves the new feature.

To Display Honors & Awards please follow guidance below:

This field should include approved industry designations listed in FB 24-043 e.g. (MDRT, LUTCF, CLU, ChFC), and/or Equitable Advisors-bestowed professional designations or titles, honors or awards that you have received relating to your professional experience.

NOTE: Any awards, ratings, or recognitions you wish to include, other than those provided by Equitable Advisors, must be approved prior to use.

Such requests must be made by completing and submitting the Request to Use Third-Party Rating in Advertisement Form by email to third-party_rating_request@equitable.com. For each award, rating, or recognition you wish to include, with the exception of 5 Star which has been preapproved by the firm, submit the attached Form as described above and refer to the FB 22-174, pg 4-5.

Upon approval, an award or rating must be presented in a way that includes: (1) the name of the award/rating, (2) the year such award/rating was won or issued, and (3) the name of the awarding or rating organization or publication. This format would generally appear as: [Name of Award/Rating] ([Year]) – [organization/ Publication]. There will also be a 3rd party rating indicator added to the Profile.

FPs who wish to reference a Five Star Wealth Manager Rating must indicate the following disclosure:

This Five Star Wealth Manager Award was given on [INSERT FULL DATE], remains valid for the year of [INSERT YEAR] and is administered by Crescendo Business Services, LLC (dba five Star Professional). Neither the named award recipient nor any other party has paid or otherwise compensated Crescendo Business Services, LLC to be considered for or to win the award.



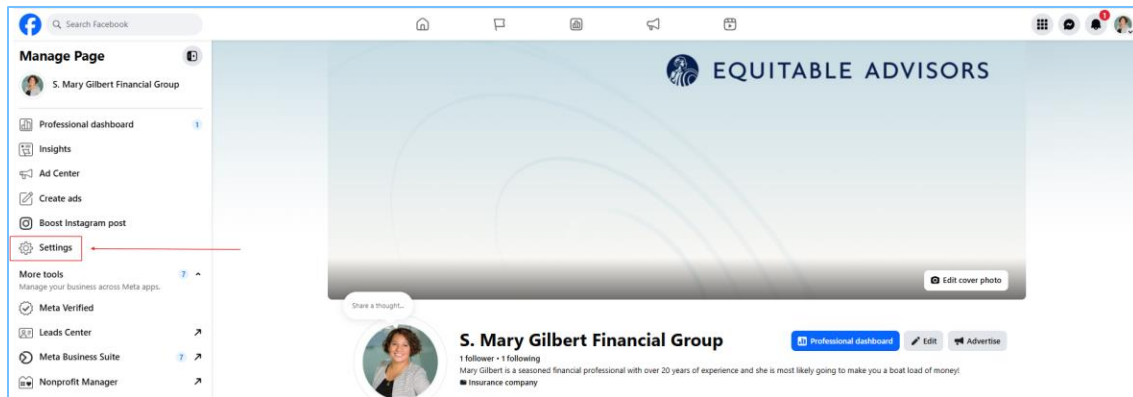
Appendix

Native Changes to Facebook Business Page

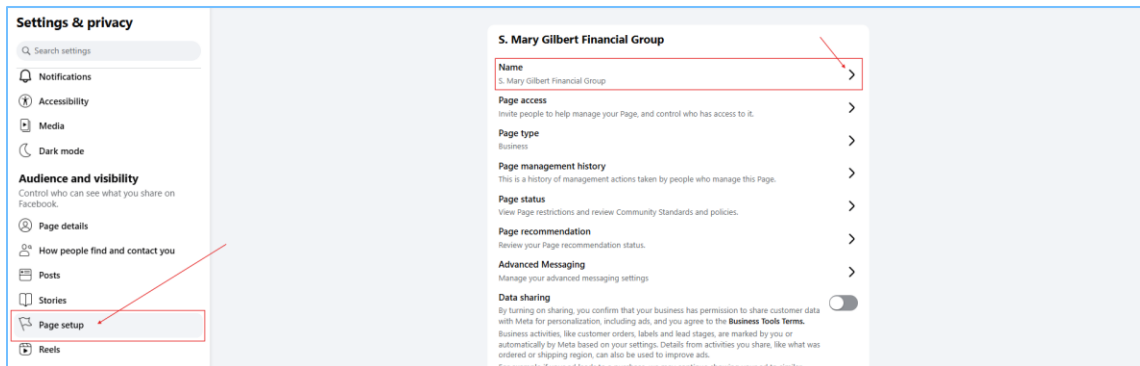
The following changes can only be made natively in Facebook. Follow these instructions to update.

Facebook Business Page Name

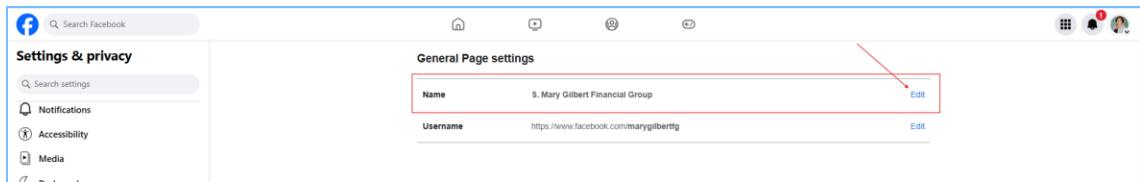
1.) Login to your Facebook Business Page and select **Settings**



2.) Select **Page Setup** on the Left Side and click on the arrow next to **Name**



3.) Select **Edit** next to your Facebook Business Page Name



4.) Enter your new Facebook Business Page Name and select **Review Change**. Facebook will need to review the proposed name change. You will receive an email once the name has been approved. **NOTE: You can only change your name on Facebook once every 60 days.**

Approved Pages Names Below:

- [Your name], Equitable Advisors Financial Professional or Financial Advisor or Financial Planner
- {Your name} Financial Consultant (if IAR registered Series 65 or 66)
- [Your name], Financial Professional
- [Your name], Equitable Advisors, LLC
- [Your name], [approved DBA name]
- [Approved DBA name]
- [Approved DBA name with Equitable Advisors, LLC]
- [Branch name], Equitable Advisors, LLC (Branch managers only)

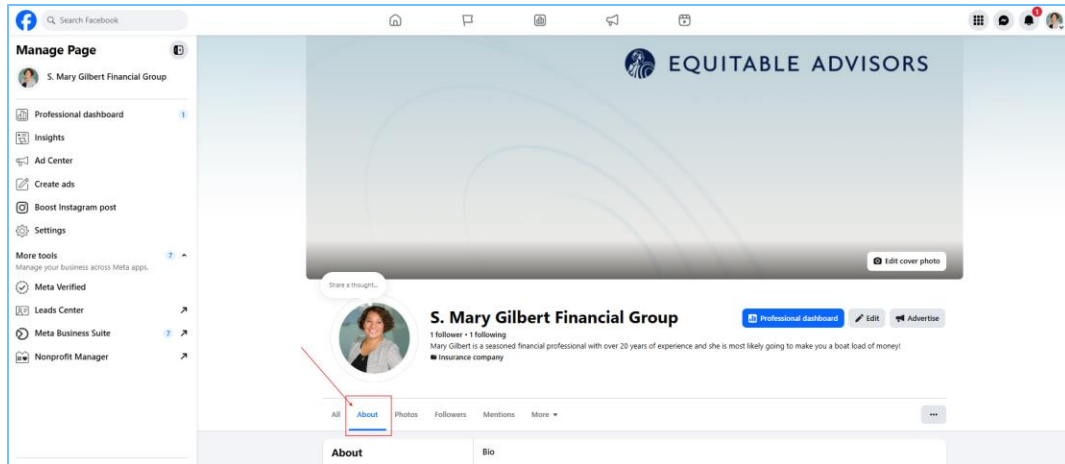


Appendix

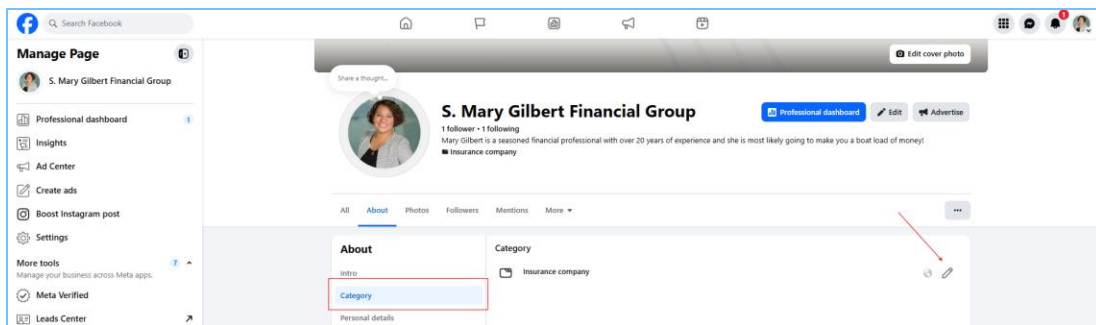
Native Changes to Facebook Business Page (Continued)

Facebook Business Page Category

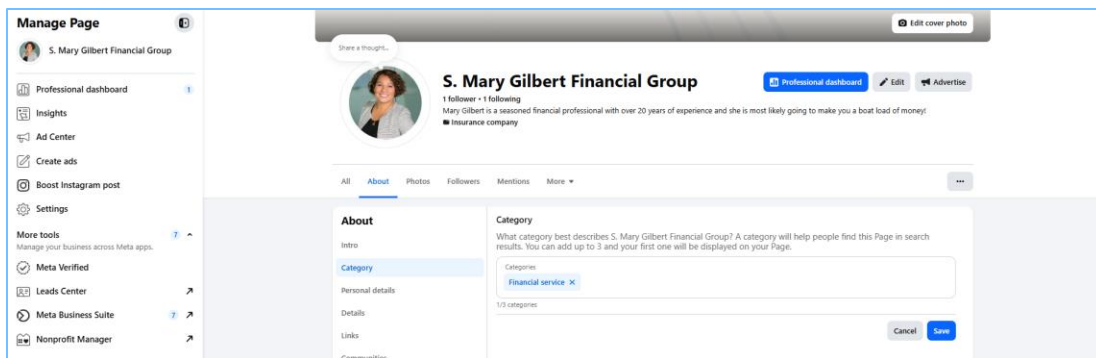
1.) Login to your Facebook Business Page and select the **About** tab



2.) Select the Category tab under the About section, then click on the **Pencil Icon** under the address field



3) Type in the words **Financial Service** hit enter, then click **Save**



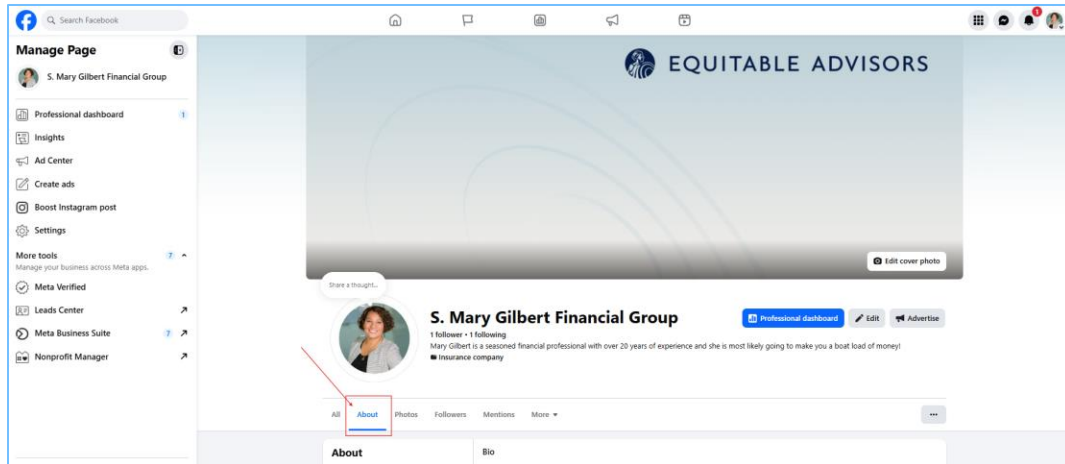


Appendix

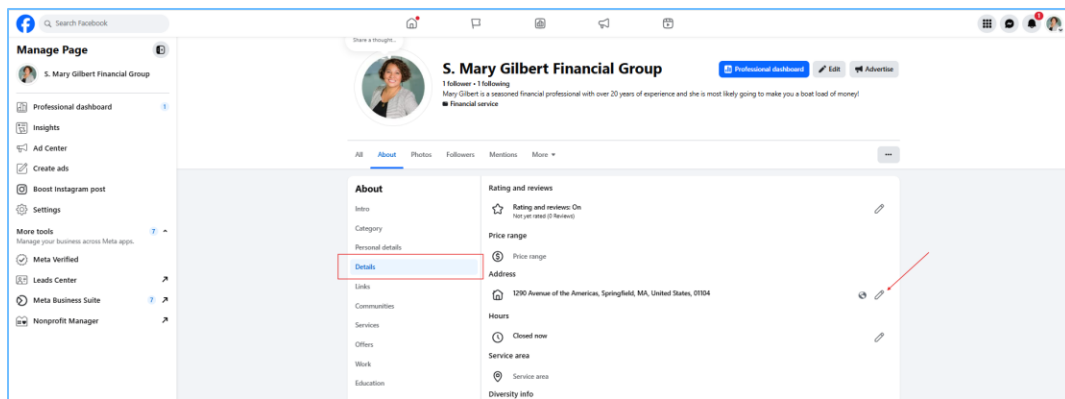
Native Changes to Facebook Business Page (Continued)

Facebook Business Page Address

1.) Login to your Facebook Business Page and select the **About** tab



2.) Select the Details tab under the About section, then click on the **Pencil Icon** for the address field



3) Enter your Equitable Advisors or approved DBA business address and select **Save**

Details

Price range

Address

Address
1290 Avenue of the Americas

City/Town
New York, New York

ZIP
10104

Neighborhood

Click and drag to reposition location

Remove Cancel Save



Appendix

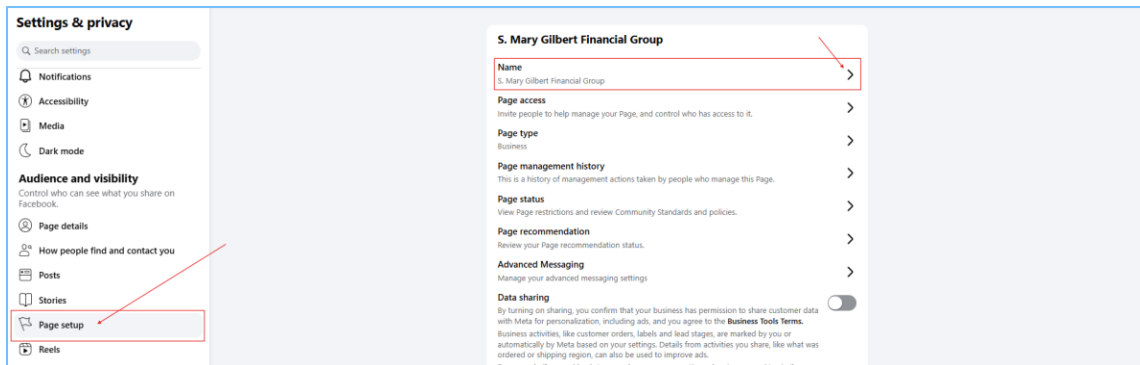
Native Changes to Facebook Business Page (Continued)

Facebook Business Page URL

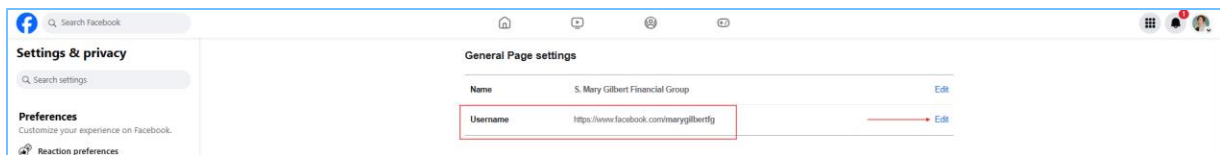
1.) Login to your Facebook Business Page and select **Settings**



2.) Select **Page Setup** on the Left Side and click on the arrow next to **Name**



3) Select **Edit** next to your Facebook Business Page Name



4.) Type your desired Username and select **Save Changes**

Username

Your public username is the same as your timeline address:

- facebook.com/marygilbertfg

Username

marygilbertfg

Save changes

Cancel



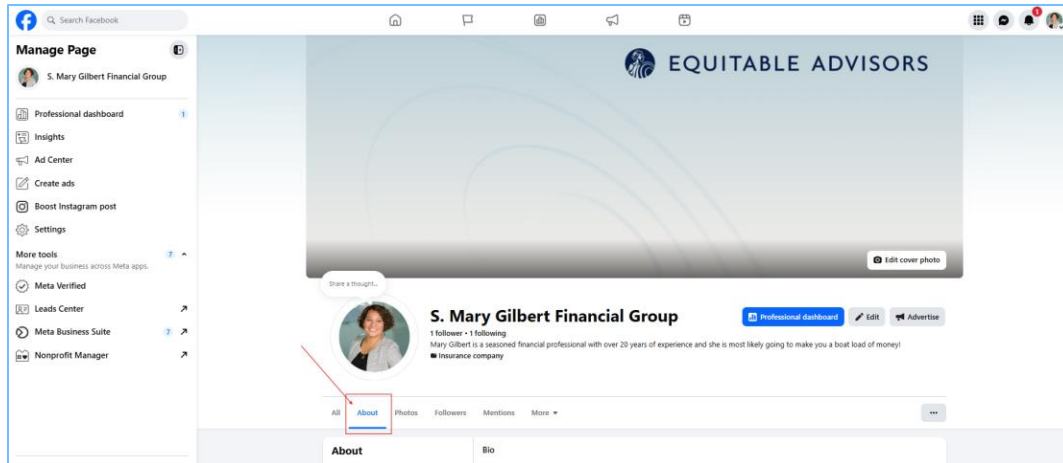
Appendix

Native Changes to Facebook Business Page (Continued)

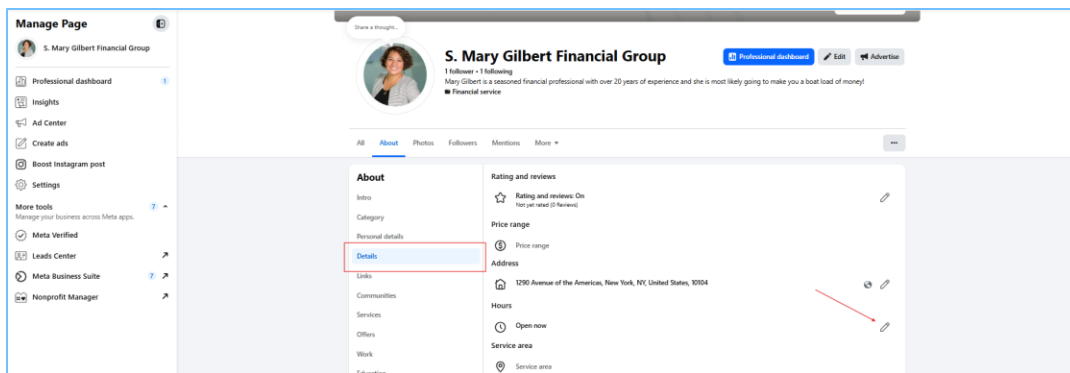
Facebook Business Page Hours

Business Always Open & Business Permanently Closed

1.) Login to your Facebook Business Page and select the **About** tab



2.) Select the **Details** tab under the About section, then click on the **Pencil Icon** for the **hours** field



3.) Choose your option and select **Save**

About	Rating and reviews
Intro	☆ Rating and reviews: On Not yet rated (0 Reviews)
Category	
Personal details	
Details	
Links	
Communities	
Services	
Offers	
Work	
Education	
Hobbies	
Interests	
Travel	
Contact info	
Privacy and legal info	
Names	
	Price range
	Address
	Hours
	☐ No Hours Available Visitors won't see business hours on this Page
	☒ Always open e.g. parks, beaches, streets
	☐ Permanently closed This business has permanently closed
	☐ Temporarily Closed e.g. closed for remodeling
	☐ Open on selected hours Input your own hours
	Service area
	Cancel Save



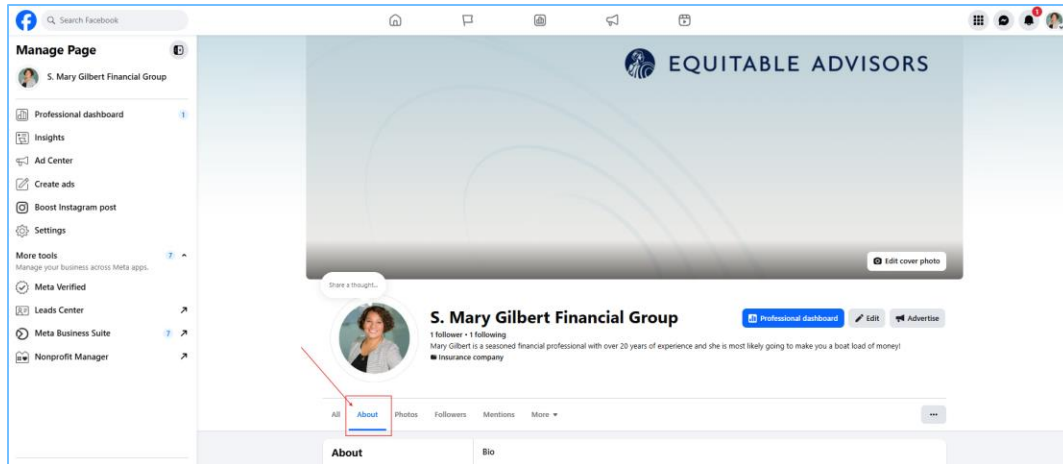
Appendix

Native Changes to Facebook Business Page (Continued)

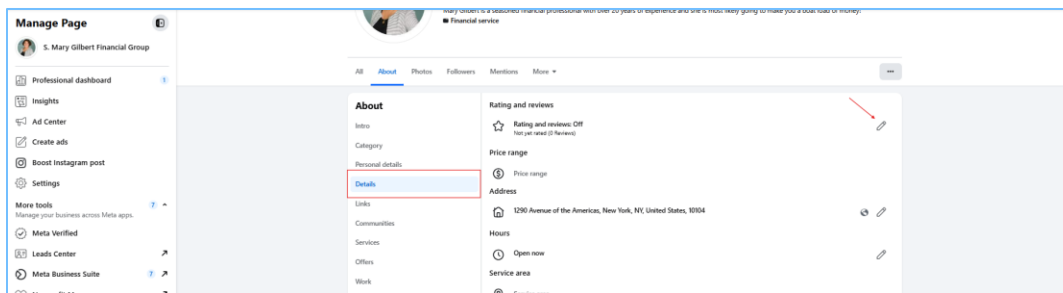
Disable Facebook Business Page Reviews

Reviews are prohibited. You must complete these steps natively on Facebook to switch reviews off.

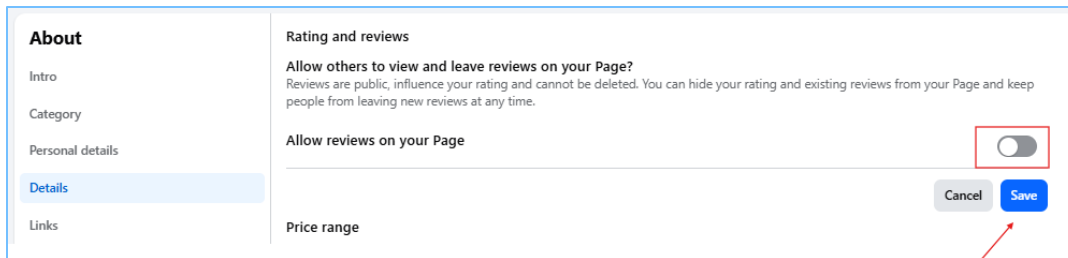
1.) Login to your Facebook Business Page and select the **About** tab



2.) Select the **Details** tab under the About section, then click on the **Pencil Icon** for the **Ratings and Reviews** field



3.) Toggle the switch to **OFF** and select **Save**.



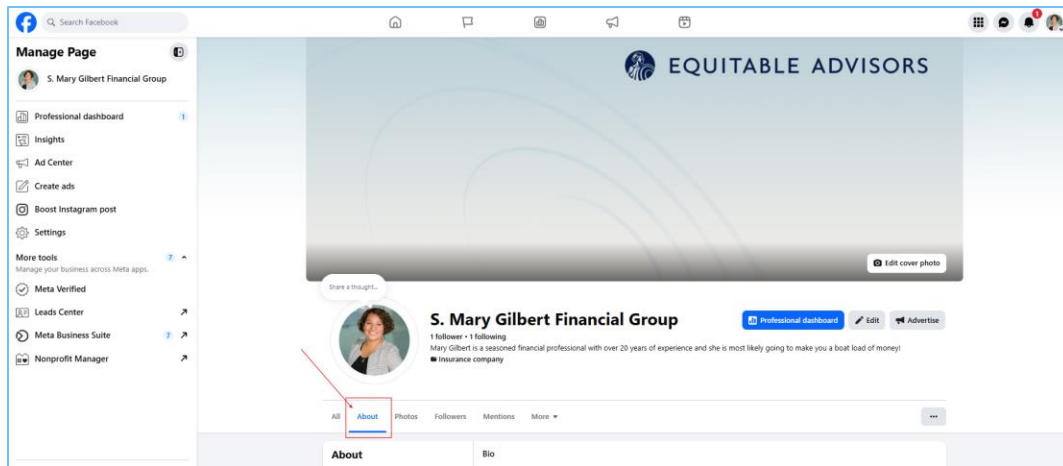


Appendix

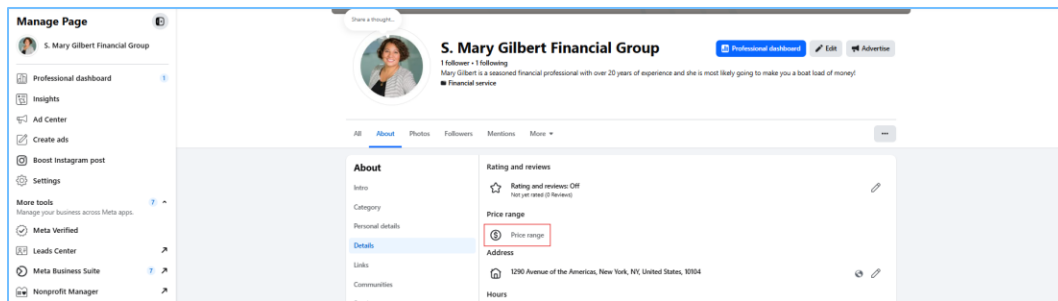
Native Changes to Facebook Business Page (Continued)

Disable Facebook Business Page Price Range

1.) Login to your Facebook Business Page and select the **About** Tab and scroll down



2.) Select the **Details** tab under the About section, then click on **Price Range** button



3.) Choose your option and select **Save**

About	Rating and reviews
Intro	☆ Rating and reviews: Off Not yet rated (0 Reviews)
Category	
Personal details	Price range
Details	☐ \$ Cheap
Links	☐ \$\$ Moderate
Communities	☐ \$\$\$ Expensive
Services	☐ \$\$\$\$ Splurge
Offers	☐ Unspecified Choose if you do not wish to specify a price range
Work	☒ Not applicable Price range is not applicable
Education	

**Facebook Services are prohibited. Do NOT select Add Services.
Additional Facebook Business Page features are PROHIBITED until Equitable Advisors
expressly approves the new feature.**