



QRC – LinkedIn Profile Fields

Please use the job aid below to compose your LinkedIn profile via Marketing Suite & Proofpoint Patrol. Please read through the guidance carefully to ensure your profile contains all required and compliant information.

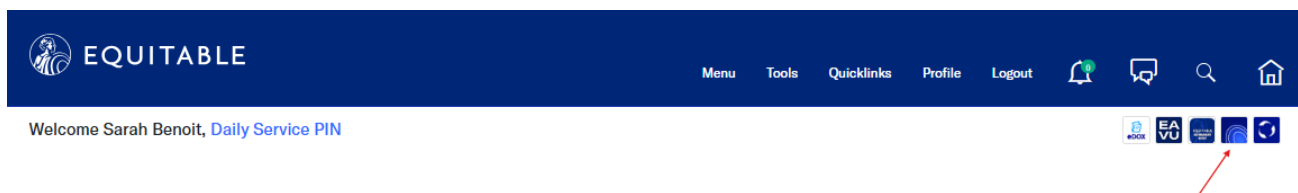
Equitable Advisors Financial Professionals & authorized branch personnel using LinkedIn for business purposes must enroll in Marketing Suite & Proofpoint Patrol. This ensures Equitable Advisors to comply with company policy and meet existing regulatory obligations. Proofpoint Patrol is the new platform for social media supervision (replacing Hearsay Social).

- For existing LinkedIn profiles, please follow the guidance outlined below.
- For new users, creating a LinkedIn profile by following the guidance outlined below. Once profile is created, please follow steps in Connecting Social Media Accounts QRC.

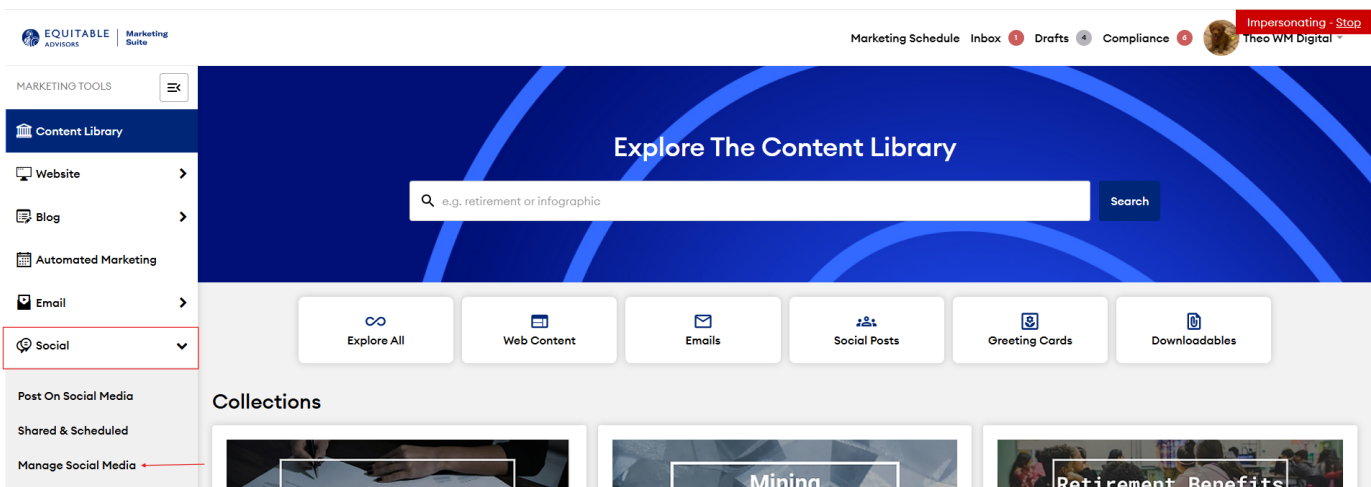
Important Considerations: LinkedIn Profile features are PROHIBITED until Equitable Advisors expressly approves the new feature(s)

Please read through the guidance carefully to ensure your profile contains all required information and is compliant with company and regulatory standards. Almost all, Social media profile updates must be completed within Marketing Suite. For those updates that can be done natively in LinkedIn, refer to the Appendix on guidance.

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



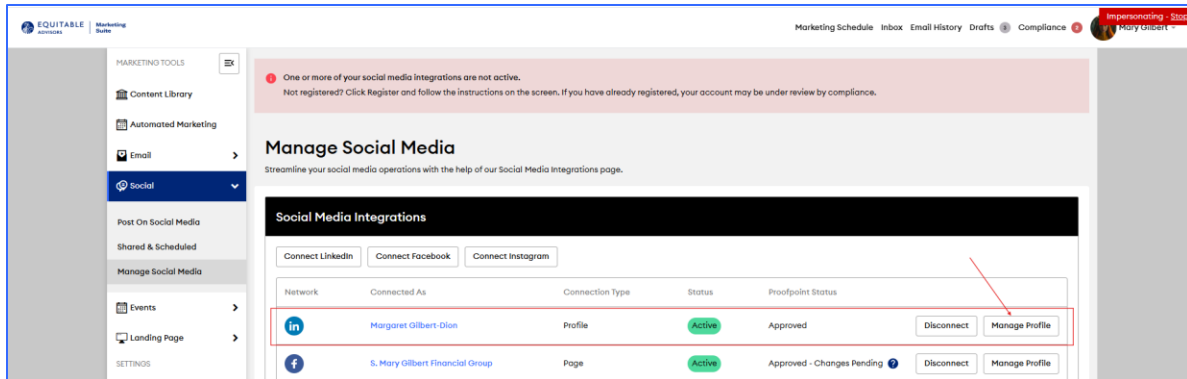
2.) Navigate to the **Social** Tab on the Left Toolbar





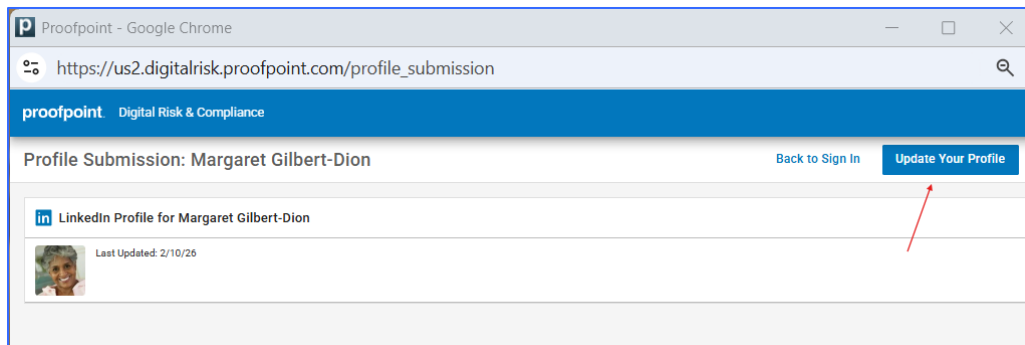
EQUITABLE ADVISORS

3.) Select **Manage Social Media** and select **Manage Profile** next to your **LinkedIn Profile (if not already connected)**

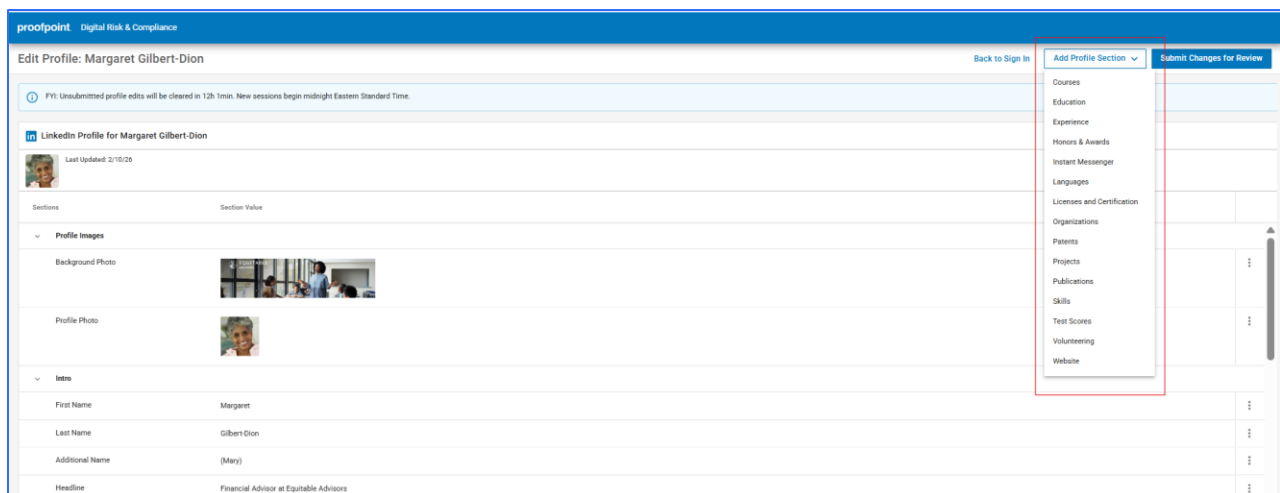


NOTE: You may be required to re enter and/or Sign in to your LinkedIn Profile.
Please have your username/email address and password available

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



5.) Many LinkedIn's profile fields are optional. Please use the appropriate fields to complete your LinkedIn Profile. 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.



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



EQUITABLE ADVISORS

LinkedIn Profile Fields

Profile Photo

Please remember that this page is a professional one and it is recommended you select a photo/image that reflects your professionalism.

For Individual LinkedIn Profiles, 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 LinkedIn Company 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.

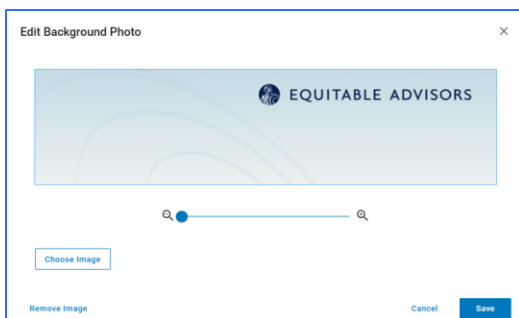


Background Photo

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.)

Brand Approved Options





EQUITABLE ADVISORS

LinkedIn Profile Fields (Continued)

Background Photo (continued)

For Producer Group LinkedIn Company 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.

First & Last Name

Must be your full name as registered with FINRA and state licensing entities

▼	Intro		
First Name	Margaret		...
Last Name	Gilbert-Dion		...

Additional Name

Equivalent to "Maiden Name". Must only be used in addition to full name, **NOT** in place of it.

▼	Intro		
First Name	Margaret		...
Last Name	Gilbert-Dion		...
Additional Name	(Mary)		...

Headline

Can use an Equitable Advisors, LLC approved title. Otherwise, must follow general advertising guidelines and not be promissory, misleading, or untrue. Headline will be reviewed as content if not using an Equitable approved title

Headline	Financial Advisor at Equitable Advisors		...
----------	---	--	-----

Industry

Must choose **Financial Services** or **Insurance**

▼	Intro		
First Name	Margaret		...
Last Name	Gilbert-Dion		...
Additional Name	(Mary)		...
Headline	Financial Advisor at Equitable Advisors		...
Industry	Insurance		...



EQUITABLE ADVISORS

LinkedIn Profile Fields (Continued)

Summary

This is your Professional Overview, and should give a brief description of what you have done, what you are doing, and the kinds of things you are interested in. **DO NOT DISCUSS OBAS.** (2,600 character limit, including spaces)

LinkedIn Profile for Margaret Gilbert-Dion

Last Updated: 2/10/26

Sections	Section Value
▼ About	
Summary	Experience financial services professional ready to assist small businesses and families in the springfield, MA metropolitan area. 
Experience	Financial Advisor at Equitable Advisors (Springfield, Massachusetts Metropolitan Area). 7/2022 - Present

Email Address - This field must be updated natively on LinkedIn

Must be your Equitable Advisors approved primary email. DO NOT LIST PERSONAL EMAIL ADDRESSES. The Primary Email Address field can only be updated natively on LinkedIn.

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

Profile URL - This field must be updated natively on LinkedIn

Please use your professional name or approved DBA. The Profile URL The field can only be updated natively on LinkedIn.

To change your Profile URL natively on LinkedIn, please follow instructions in the Appendix.

Address and Geo Location

Must be your address as registered with FINRA

Geo Location	Springfield, Massachusetts, United States
▼ Contact Info	
 Profile URL	mgfg
 Email Address	Sarah.Dion@equitable.com (primary)
Phone	(212) 555-9000 (MOBILE)
Address	1345 Avenue of the Americas, 4th Floor, New York, NY 10104

Phone

Must be your registered phone number (on LARS). Phone type option must be **Work**.

Last Updated: 2/10/26

Sections

▼ Contact Info

Geo Location

 Profile URL

 Email Address

Phone

Edit Phone

Language: English (Primary)

Phone

(212) 555-9000

WORK

Cancel Save



LinkedIn Profile Fields (Continued)

Organizations

If you wish to add more than one Organization, please select **Add Profile Section**
Please be aware that many of these sub fields are not required.

Note: For current Organizations, please refer to the **Outside Business Activity policy** to determine if also required to be disclosed as an Outside Business Activity in Pinpoint.

Add Organizations

Language: English (Primary)

Name

Position held

Associated with

Select an option

Start Month

Select an option

Start Year

Select an option

End Month

Select an option

End Year

Select an option

Description

Cancel

Save

Birthday

Please enter your birth Month & Date

Edit Birthday

Language: English (Primary)

Month

January

Day

1

Cancel

Save

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.

Edit Website

Language: English (Primary)

Category

Company Website

URL

www.equitableadvisors.com

Cancel

Save



EQUITABLE ADVISORS

LinkedIn Profile Fields (Continued)

Experience

- **Company Name:** Must Choose “Equitable Advisors” or list your Equitable approved DBA name
- **Title:** Must be an Equitable Advisors, LLC approved title that is consistent with and appropriate for your current registrations, licensing and credentialing.
Other titles are available; please see Compliance Manual, “Titles and Designations”.
- **Location:** Must match FINRA registered office location.
- **Time Period:** Enter “Start Month” & “Start Year”.
Please leave “End Month” and “End Year” blank (only for current experience)
- **Description:** should provide some details of the position, (2,000 characters)

NOTE: If employed with AXA Advisors prior to rebrand the following disclosure is permitted: “AXA Advisors has updated the overall brand for our family of companies to Equitable Advisors (effective January 14, 2020)”.

If you wish to add prior/past Experiences, please select Add Profile Section

Edit Experience
Language: English (Primary)

Title *
Financial Advisor

Company *
Equitable Advisors

Location
Springfield, Massachusetts Metropolitan Area

Start Month
July

Start Year
2022

End Month
Select an option

End Year
Select an option

Description

Cancel Save

Experience

 **Financial Advisor**
Equitable Advisors · Self-employed
Jul 2022 - Present · 3 yrs 10 mos
Springfield, Massachusetts Metropolitan Area · Remote

Honors & Awards

This field should include approved industry (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:** Many of these sub fields are not required.

*If you wish to add prior/past Honors & Awards, please select **Add Profile Section***

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/ 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.



EQUITABLE ADVISORS

LinkedIn Profile Fields (Continued)

Languages

If you wish to add more than one Language, please select Add Profile Section

Edit Languages

Language: English (Primary)

Language

English, Spanish

Proficiency

PROFESSIONAL_WORKING

Cancel

Save

Courses

Must be factual and accurate.

Edit Courses

Language: English (Primary)

Course name

Financial Planning 101

Number

A12345

Associated with

Student at Westfield State University, B

Cancel

Save

Licenses and Certification

FINRA Exams may be listed and must be accurate. If you wish to additional Certifications, please select Add Profile Section.

NOTE: Many of these sub fields are not required.

Add Licenses and Certification

Language: English (Primary)

Certification name

Certification authority

License number

Start Month

Select an option

Start Year

Select an option

End Month

Select an option

End Year

Select an option

Certification URL

Cancel

Save



EQUITABLE ADVISORS

LinkedIn Profile Fields (Continued)

Volunteering

If you wish to add additional Volunteer Experience, please select Add Profile Section.

NOTE: Many of these sub fields are not required.

Add Volunteering

Language: English (Primary)

Company Name

Role

Cause

Select an option

Start Month

Select an option

Start Year

Select an option

End Month

Select an option

End Year

Select an option

Description

Cancel

Save

Publications

You must now add ALL applicable Disclosures in the Publications section . You may need to add multiple publications. If you wish to add additional Publications, please select Add Profile Section.

NOTE: The kitchen sink default disclosure must be included for all LinkedIn profiles.

Title: Equitable Advisors Disclosure

Summary: Kitchen Sink Default Disclosure

All other sub fields are not needed for Disclosure requirements

Mandatory Kitchen Sink Default Disclosure. The disclosure below must be included for all LinkedIn Profiles. Copy and paste disclosure below to add to the Publications section.

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 (212) 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



EQUITABLE ADVISORS

LinkedIn Profile Fields (Continued)

Publications (continued)

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

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# _____]

Skills

A full list of approved Skills are located in the Appendix of this document. Please add the ones you would like to use. Other skills may be added but will need to first be reviewed and approved by Regional Compliance

NOTE: PLEASE DO NOT LIST LICENSES OR OBA RELATED SKILLS. LICENSES MUST BE LISTED IN THE CERTIFICATIONS LINKEDIN SECTION

Add Skills

Language: English (Primary)

Name

Select an option

Enter a skill or select from your organization's pre-approved options, if available.

Cancel

Save

Education

School is the only mandatory field. All other sub fields are not mandatory.

Add Education

Language: English (Primary)

School *

Degree

Field of study

Activities and societies

Start Year

Select an option

End Year

Select an option

Description

Cancel

Save



LinkedIn Profile Fields (Continued)

Test Scores

Only Test Name and Score are mandatory fields. All other sub fields are not mandatory fields.

PROHIBITED LinkedIn Profile Fields

The following fields on LinkedIn are **prohibited for use**. Please do not enter any information into these fields.

- Instant Messenger
- Projects
- Patents

In addition, hiding Endorsements & Recommendations on your LinkedIn profile is required. Please follow the steps outlined in the Appendix & LinkedIn: Hiding Endorsements & Recommendations QRC.

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

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 within the email notification.

Additional LinkedIn profile features are PROHIBITED until Equitable Advisors expressly approves the new feature(s)



Appendix

Approved LinkedIn Skills List

Below is a full list of approved Skills. This is not an all inclusive list. Other Skills may be added but will need to first be reviewed by Regional Compliance

401k Distribution Planning	Financial Advisory Services <i>*IAR Only</i>	Microsoft Office
401K Services	Financial Analysis	Mutual Fund Strategies
401ks	Financial Consulting	Mutual Funds
403b Services	Financial Management	New Business Development
403bs	Financial Planning <i>*IAR only</i>	Pension Distribution Planning
529 Plans	Financial Professional	PowerPoint
Accounting <i>*only if you are a CPA & approved to offer CPA services through the company – not via OBA</i>	Financial Services	Products: Non-brand specific (annuities, life, insurance, 403bs, etc.)
Annuities	Financial Strategies	Public Speaking
Annuity Services	Guaranteed Income Strategies	Research
Annuity Strategies	HTML	Retirement Planning
Asset Allocation Strategies	Income Annuities	Retirement Planning Specialist – Qualified Plans
Bookkeeping	Income Annuity Strategies	Retirement Planning Strategies
Budget Strategies	Income Protection Strategies	Retirement Planning Strategies
Business Succession Planning <i>*IAR Only</i>	Income Strategies	Risk Management
Business Succession Strategies	Insurance	Rollover Strategies
Client Education	Insurance Planning	Social Media
College Planning Strategies	Insurance Services	Social Media Marketing
CPA <i>*only if you are a CPA & approved to offer CPA services through the company – not via OBA</i>	Insurance Strategies	Strategic Partnerships
Customer Service	Investment Advisory Services <i>*IAR Only</i>	Tax-deferred Investment Planning
Digital Marketing	Investment Management	Tax-efficient Distribution Strategies
Education Planning Strategies	Investment Planning <i>*IAR Only</i>	Tax-efficient Investing Strategies
Employee Benefit Strategies	Investment Services	Teamwork
Employee Benefits	IRA Distribution Planning	Wealth Management
English	IRA Rollover Strategies	Wealth Management Strategies
Estate Conservation Strategies	IRAs	Wealth Preservation Strategies
Estate Planning Strategies	Long-term Care	
Executive Benefits Planning	Long-term Care Planning Strategies	
Finance	Marketing	
Financial Accounting	Marketing Communications	



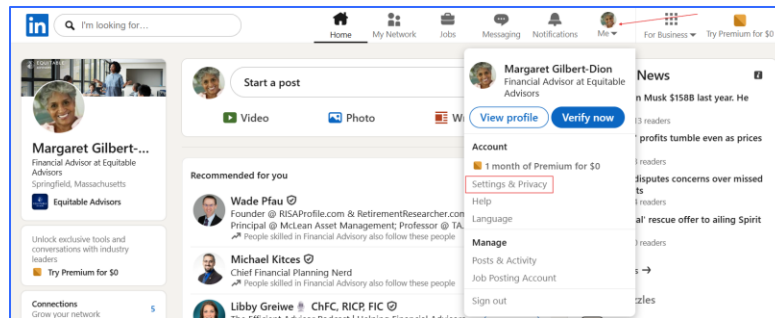
Appendix

Native Changes to LinkedIn Profile Fields

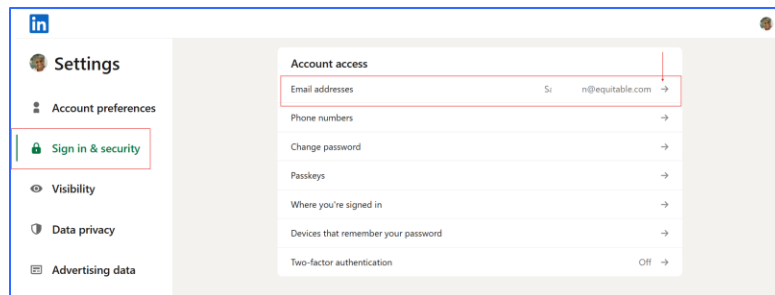
The following changes can only be made natively in LinkedIn. Follow these instructions to complete.

Experience

- 1.) Login to your LinkedIn Account.
- 2.) Click the **Me** icon at the top of your LinkedIn homepage and select **Settings & Privacy**



- 3.) Navigate to **Sign in & Security** and select the arrow next to your email address you wish to change.



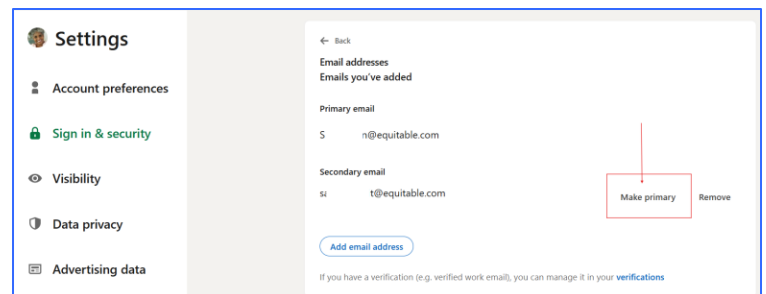
- 4.) Select **Add Email address**. If applicable, enter the 6-digit pin code generated from LinkedIn to your email.
- 5.) Enter your **approved business email address**, enter your **LinkedIn password** and select **Submit**.
- 6.) You will then receive an email from LinkedIn to verify your newly added email address. Click on the link in that email to verify your account.
- 7.) Once verified, please select **Make Primary** from the Sign in & security section

Email addresses
Add a new email

Enter new email address *

A confirmation will be sent to this account. Click on the confirmation link to verify and add this email.

Enter your LinkedIn password *





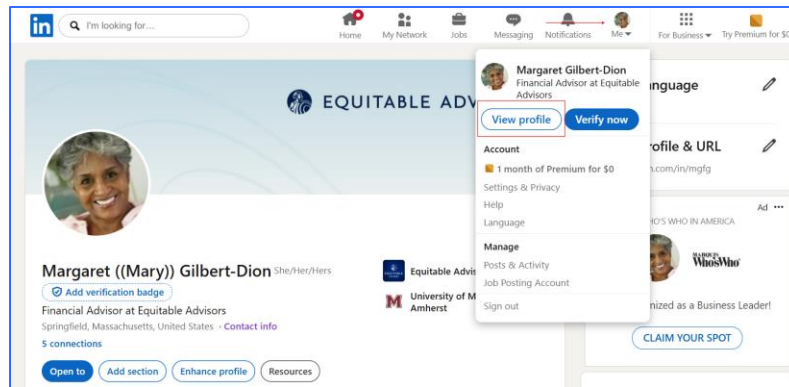
Appendix

Native Changes to LinkedIn Profile Fields

The following changes can only be made natively in LinkedIn. Follow these instructions to complete.

LinkedIn URL Address

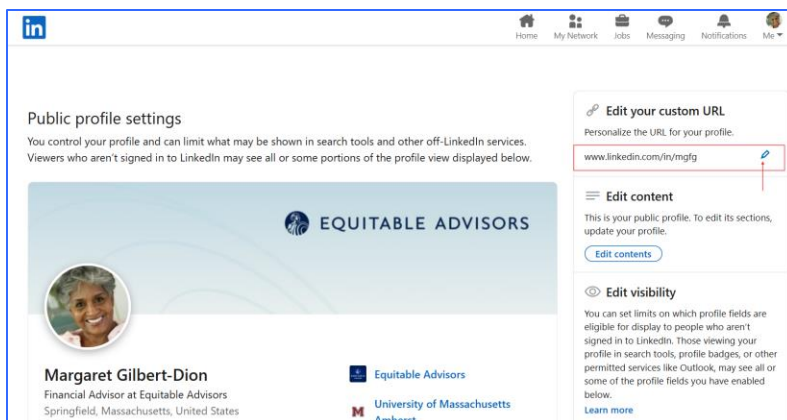
- 1.) Login to your LinkedIn Account.
- 2.) Click the **Me** icon at the top of your LinkedIn homepage and select **View Profile**



- 3.) On your Profile Page, select the **Pencil** icon next to the **Public Profile & URL** section



- 4.) Under the **Edit your custom URL** section, click on the pencil icon. Enter your customized URL and press the **Save** button



 **Edit your custom URL**

Personalize the URL for your profile.

www.linkedin.com/in/mary-gilbert-equit

Note: Your custom URL must contain 3-100 letters or numbers. Please do not use spaces, symbols, or special characters.

Cancel Save