



EQUITABLE
ADVISORS

Social Media

Best Practices

2026

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1

Why use social media?



Why use social media?

How social media can help you build your business:

Social media has become ubiquitous in today's "always-on" digital landscape. It's used by celebrities, business influencers and everything in between. But can social media really make an impact on your business? The answer is a resounding, YES. BUT, it's not enough to simply post on social media, the posts need to be crafted to tell a unique and authentic story.

How is social media different from other marketing channels?

Social media isn't a broadcast channel. Focus on creating original content that's authentic to you, your business and/or your branch which tells a story and highlights why you're unique. Focus on what would be interesting, educational or entertaining to your **audience**.

How does it drive value?

Social media can be an excellent tool to help branches and financial professionals achieve business objectives. For **branches**, it can be a great recruiting tool as well as a business development tool. For **financial professionals**, there's arguably no better tool to help you grow your business by developing your personal brand, which will result in increased business development opportunities –social media makes prospecting and referrals easier!



2

What to say (and what NOT to say)



Where to post: Platforms

Social media posts (SMPs) are an important part of our communication strategy to clients, prospects and financial professionals. Social media posts can be used for a myriad of purposes.

Examples include:

- Build awareness for corporate, branch or FP-focused initiatives and programs.
- Aid in recruiting efforts.
- Show recognition to new employees, industry recognition received or promotions.
- Extend holiday greetings.

Before using social media, please review the company's [Social Media Policy](#).

Before you post:

When developing content, keep the following in mind:

- ✓ Content (images/videos included) needs to be fair, balanced and not misleading or speaking disparagingly of other companies or field producers.
- ✓ Respect copyright laws.
- ✓ Do not discuss, promote or reference Equitable's financial strength, ratings, earnings, assets under management or claims-paying ability.
- ✓ Review Compliance Notes on the following pages...

Quick Social Tips:

- Use visuals in your posts such as bold images, GIFs to increase engagement with your social media networks
- Entice your audience with news and events; don't be afraid to share important milestones
- Think about how you can educate your audience by demonstrating thought leadership among other professionals
- Don't forget about your target market and what will resonate with this audience
- Don't be shy. Forward interesting articles to your Centers of Influence to stay top of mind

Social Media Compliance Notes

This “cheat sheet” is intended to assist in the creation of social media posts and communications.

- No product or service specific communication.
- No market commentary.
- All communications must be fair and balanced and must provide a sound basis for evaluating the facts included in the communication.
- Communications may not make any false, exaggerated, unwarranted, promissory or misleading statements or claims.
- Communications may not predict or project performance, imply that past performance will recur or make any exaggerated or unwarranted claim, opinion or forecast.
- Always reference or cite sources appropriately.
- All links /3rdparty content is public facing and not under a login or for FP Use Only.
- Unless authorized by the Company, do not discuss, promote, reference or explicitly mention any of the products or client services offered by Equitable or through Equitable Advisors, Equitable Distributors, Equitable Network or any of their associates, agents, affiliates or DBAs.
- Do not compare Equitable or its affiliates to other companies, or compare any of their products, client services, or DBAs to those of other companies.
- Be respectful to Equitable’s and its affiliates’ customers, partners and competitors.
- Never make disparaging remarks and never use racial, ethnic or any other slurs or insults, obscenity, or engage in any conduct that would violate any of Equitable’s policies.
- Respect and obey copyright laws, fair use and financial disclosure laws. Do not use artistic creations of others in your posts, such as photos, music, writing, or samples/excerpts thereof, unless you know it is available for public use or you have permission to use it. Such use could subject you to personal liability.
- Obtain permission by any non-Equitable personnel in the photo or if a child, by their guardian, to use their photo via the Social Media Photo Release form.

3

Where & how to post



Where to post: Platforms

Which social channels are most effective (and which are you able to use at Equitable)?

- As part of the Equitable Advisors Social Media Program, you can utilize Facebook Business Page (branches and financial professional) and LinkedIn (financial professionals only). FPs must enroll in Equitable Advisors Marketing Suite and Proofpoint Patrol.
- Each of these platforms serve different purposes.

LinkedIn is a great channel to build your influence, profile and person brand by sharing content which aligns with your values and areas of interest/specialty. Executing effectively on LinkedIn can help to build business connections and awareness among a high-value audience.

Facebook Business Page can be a great tool to build your brand with a consumer audience. Due to the nature of Facebook business pages restricting unpaid post reach, it's highly recommended that you promote your best content to ensure it's seen by a relevant local audience.

Approved



Unapproved



Approved for use by
Pilot Participants



How to post: Equitable Advisors Marketing Suite

Equitable Advisors Financial Professionals (FPs) and authorized branch personnel who are interested in utilizing social media for business purposes may do so by enrolling in Equitable Advisors Marketing Suite and Proofpoint Patrol. Proofpoint Patrol is our third-party vendors that has been engaged by Equitable to assist us in addressing applicable company policy and existing regulatory obligations and compliance requirements. Proofpoint Patrol is the platform that captures the information on the social media profiles that are linked to its platform and also facilitates electronic submission of social media content to local and regional compliance teams, electronic surveillance and Advertising Compliance (AdC) teams.

For FPs to enroll in Equitable Advisors Social Media Program please see steps below:

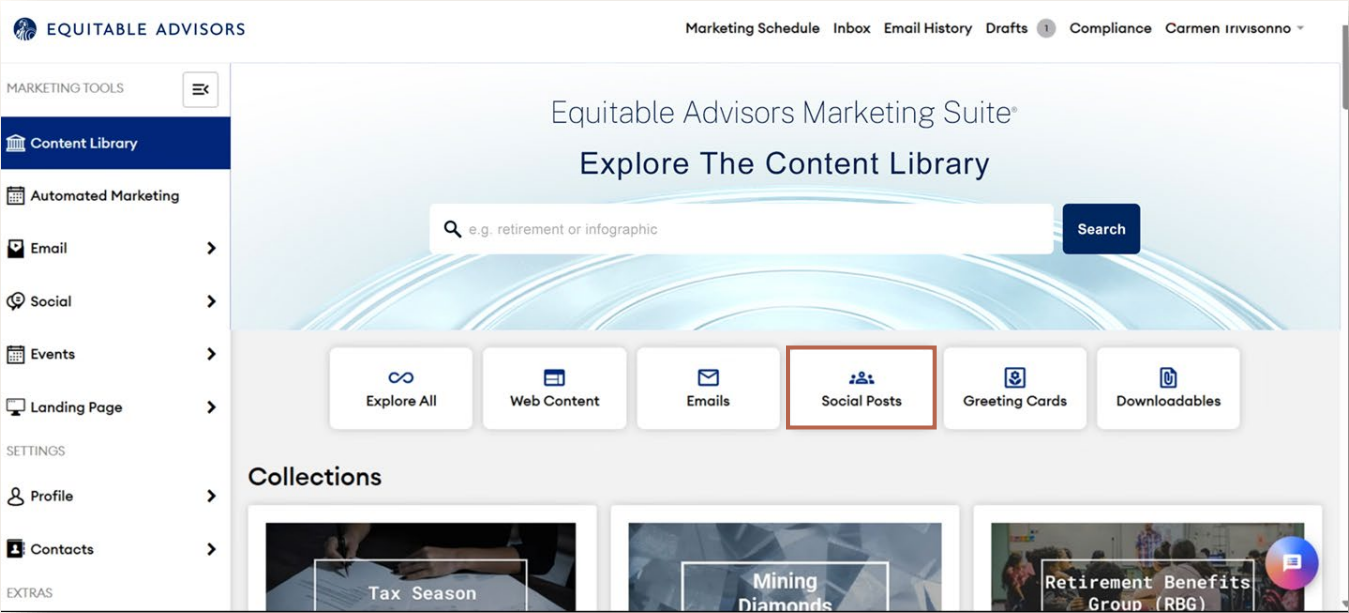
- Login to Equitable.com and select EAVU from "Tools"
- Complete the following courses:
 - **Accept Terms of Participation**
 - **Social Media for Financial Professionals**
 - **LinkedIn Overview for Financial Professionals**
 - **Facebook Overview for Financial Professionals**



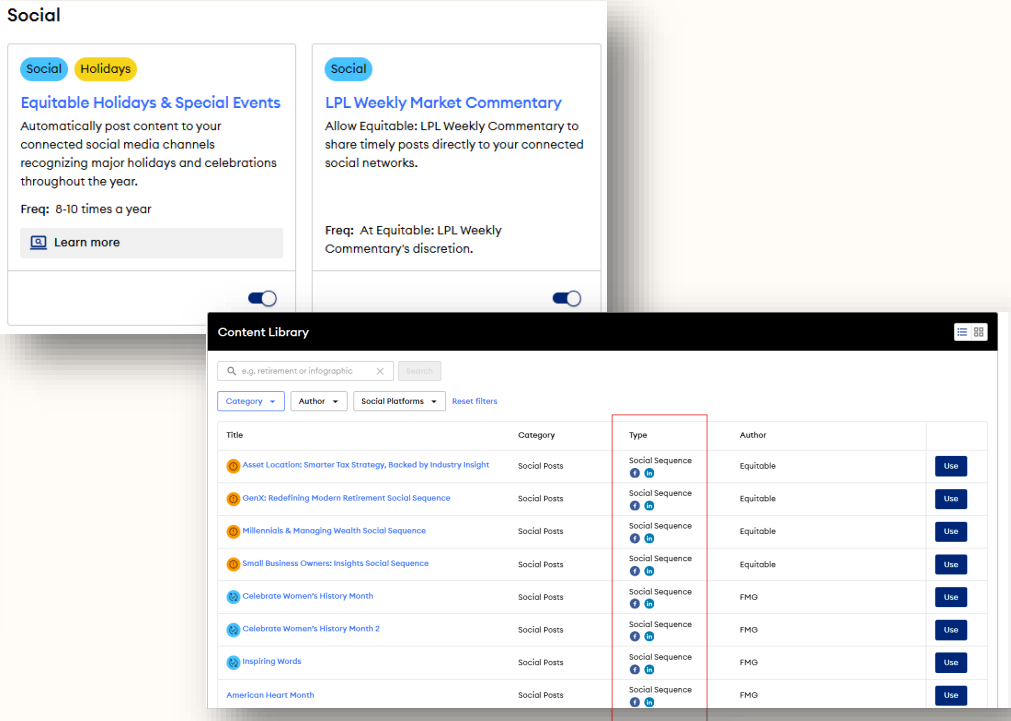
Equitable Advisors Marketing Suite

Marketing Suite & Proofpoint Patrol enables users to stay compliant and use many of the interactive features of LinkedIn and Facebook Business Pages.

In Marketing Suite, users have access to hundreds of compliance approved social media posts.



Users also have access to social media automations and sequences.



Custom Content

Within Equitable Advisors Marketing Suite, you can create custom content to publish to your connected and compliance approved social media accounts. Original content always proves to show more engagement with your social media connections and followers!

The image displays a series of overlapping screenshots from the Equitable Advisors Marketing Suite, illustrating the process of creating and publishing custom social media content. The main interface shows a sidebar with navigation options like 'Automated Marketing', 'Email', 'Social', 'Events', 'Landing Page', 'Settings', 'Profile', 'Contacts', 'Extras', and 'Help'. The 'Social' section is highlighted, leading to the 'Create Social Post' screen. This screen includes a 'Post To' dropdown menu, a 'Browse Social Post Library' button, and a 'Post' text area. A 'Preview' section shows the post as it will appear on the selected social media profile. The workflow continues through a 'Compliance Scan' step, where users can 'Run Compliance Scan' or 'Skip'. A 'Choose Your Post Date' screen allows users to select whether the post goes out immediately or is scheduled for a future date. The final steps show a 'Nice Work—Your Content Cleared The First Compliance Check!' message and a 'Compliance Scan' screen with a 'Back' and 'Next' button.

4

Design templates



Branded design templates

To take the guess-work out of creating an in-Brand social media post, we've created a suite of templates within Canva to get you started.

[Event-based Social Template](#)

[Personal Small Circle Photo Template](#)

[Personal Large Square Photo Template](#)

Click link for preferred template above

Select 'View Template'

- If signed into Canva already, click 'Open in Editor'
- If not signed in, first sign or create your Canva account
 - If signing up for the first time, select 'continue with email'
 - Then enter your approved business email address
 - Enter your name and click continue
 - Populate verification code sent to the provided email (be sure to check your junk folder if you do not receive this right away)
 - Click on the X to close the dialog box
- Follow the instructions on page 2 in the Canva template



Co-Branded design templates

To take the guess-work out of creating an in-Brand social media post, we've created a suite of templates within Canva to get you started.

[Co-branded Event-based Social Template](#)

[Co-branded Personal Small Circle Photo Template](#)

[Co-branded Personal Large Square Photo Template](#)

Click link for preferred template above

Select 'View Template'

- If signed into Canva already, click 'Open in Editor'
- If not signed in, first sign or create your Canva account
 - If signing up for the first time, select 'continue with email'
 - Then enter your approved business email address
 - Enter your name and click continue
 - Populate verification code sent to the provided email (be sure to check your junk folder if you do not receive this right away)
 - Click on the X to close the dialog box
- Follow the instructions on page 2 in the Canva template

EQUITABLE ADVISORS



EQUITABLE ADVISORS: SOCIAL MEDIA

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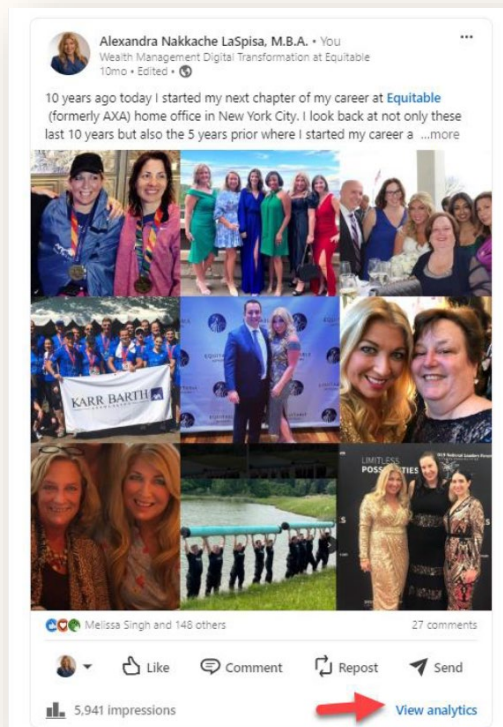
Metrics



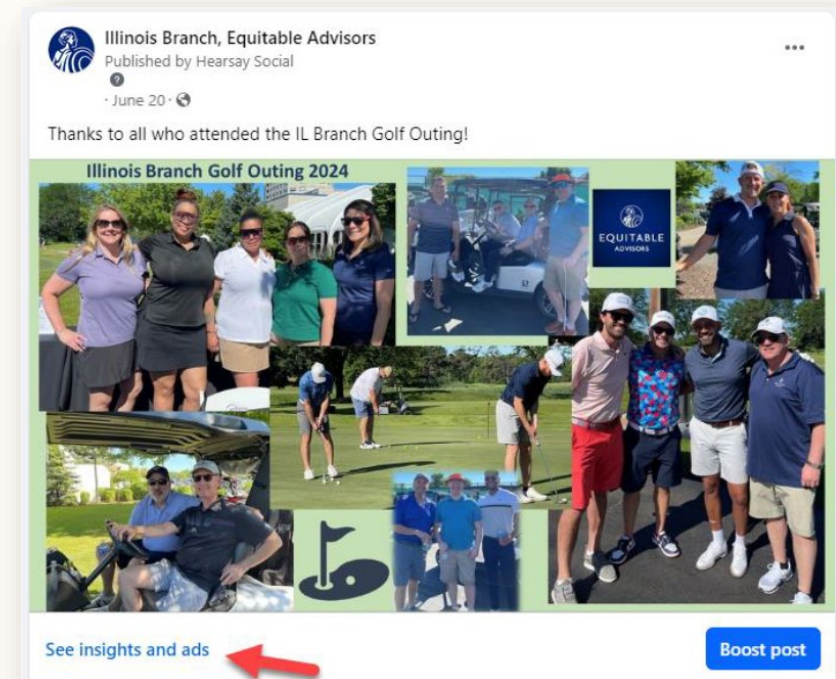
Social Media Metrics

Always make sure to review the Metrics tab on your social media sites on key criteria of engagement of posts, growth of your social media networks, etc.!

Select the **View Analytics** and view the details for LinkedIn:



Select **See Insights & Ads** to view the details for your Facebook Business Page:



Resources

- [Social Media Policy](#)
- EAVU → Digital Tools → Social Media
- [Equitable Advisors Marketing Suite Program Microsite](#)
- AdvisorMartech@equitable.com
- Complex Digital Leads & Strategic Marketing Partners
- [National Training Calendar](#)

- Brand Resources
 - [Brand Hub](#) – For on-brand photos, icons, logos, guidelines, etc.
 - [Advisor Brand Connection](#) – For advisor brand resources