



QRC – Events

Frequently Asked Questions (FAQ)

Compliance guidance around events can be found in FB 23-012

FMG KNOWLEDGE GUIDES ON EVENTS:

- [Adding New Events](#) – How to create an event in Equitable Advisors Marketing Suite
- [Managing Your Events](#) – How to view and manage event registrations
- [Promoting an Event](#) – How to invite people to your events
- [Creating an Events Intro](#) – Updating the intro paragraph of your event rollup webpage (website users only)
- [Use FMG Tools to Get the Most From Your Webinars](#) – How to integrate webinars with platform functionality

Frequently Asked Questions

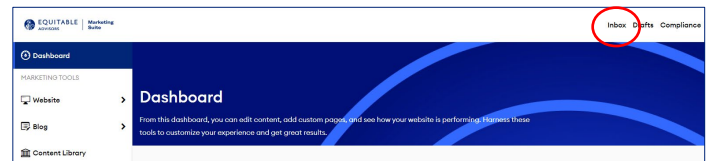
REGISTRATION

Can registrant information be captured to use in future marketing efforts?

The platform captures attendee information during event registration. Within the registration form, there is a check box labeled 'Keep me posted about news and events.' If registrant has this box checked, they will automatically be added into your contacts list in platform.

How am I notified when someone registers for my event?

Event owners will receive an alert in their Inbox within the platform. If they have email notifications turned on, they will also receive an email notification. →



Is there an RSVP function?

No, the platform only has a registration function today.

What does the registrant / attendee cancellation process look like?

There is no built-in process (RSVP functionality) within the system to capture a cancellation. From a best practice standpoint, it's recommended to include any cancellation information in the 'Additional Info' field. →

Can we limit the total number of attendees for an event? Does this number include registrants and their additional attendees?

Yes, you can limit the number of total registrants.

The maximum number of registrants you set will include both those signing up and any additional attendees they include. When registration is full, your event landing page will automatically remove the registration form and show an 'Event Full' message instead.



Frequently Asked Questions Cont.

REGISTRATION CONT.

What happens if someone tries to register (either alone or with additional attendees) and exceeds the limit?

During registration, if the registrant is trying to register more guests than spaces available, then they will receive an error message that says 'Unfortunately, this event only has (X) spot(s) left.'

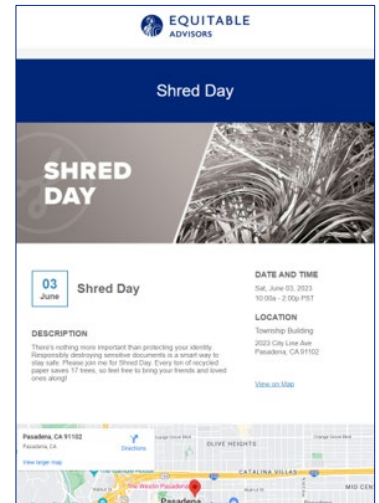
EVENT LANDING PAGE

What is an event landing page and how do I preview it?

An event landing page is a webpage designed specifically for your event. It shows an event description, day/time of the event, location, and (when registration is open) your registration form.

Once you create your event and publish or save it as a draft, the platform will display a preview button on the 'my events' page next to the event listing you created.

To learn more about customizing your event landing pages, view this FMG Knowledge Base Guide: [How to customize your landing page](#)



PROMOTING AN EVENT

Does my event need to be compliance approved before I can promote it?

Yes, your event landing page and details will need to be reviewed and approved by compliance prior to promoting your event to your contacts. See additional details on the compliance approval process on page 3 of this document.

If my event registration is full, will FMG automatically turn off the promotional emails driving registration?

Unfortunately, the system does not automatically turn these promotional emails off when the event is full.

To stop the system from sending out additional promotional emails, navigate to the 'Email' tab, then click on 'Sent and Scheduled'. Once you locate the promotional email you'd like to cancel, click on the hyperlinked subject line. When the window loads, you will see a 'Delete without sending' button. It will ask you if you want to delete the selected email or all emails left in the sequence. Select 'Delete all scheduled' and this will trigger the system to stop any further email promotions.

Can I adjust the timing between emails sent in the event promotion email sequence?

Yes, you can adjust the number of days between emails in a sequence by clicking on the 'Edit Sequence' hyperlink in the yellow box and then changing the number of days in the 'Wait for X days' field.

Please note you should always review the timing of sequences to ensure they are scheduled to send on the preferred days of your choosing. The default event email sequence will send out three emails over the course of 2 weeks. If your event is taking place in less than 2 weeks from your event approval date, be sure to adjust the sequence timing.

I'm hosting a virtual event – how do I share the Microsoft Teams/Zoom link with my registrants?

Under the 'Choose Registration Options*' section of the event page, you can add the attendee link to the 'Details For People Who Register' field. This information will then automatically be included in your event confirmation and reminder emails that are sent to registrants.



Frequently Asked Questions Cont.

PROMOTING AN EVENT CONT.

Do all event templates have a greeting card promotion option?

No, the only event templates that allow promotion with greeting cards are the *Shred Day* and *Open House* event templates.

CREATING & PROMOTING PRACTICE-WIDE EVENTS

Our Team/DBA/Branch is hosting an upcoming event – should each advisor create an invite in the platform and promote it?

No, for this scenario we'd recommend creating a single event registration landing page and then provide each member of the practice materials to promote that event landing page.

If the Team/DBA/Branch has a website on the FMG platform, we'd recommend creating the event on the website owner's account. That way, the event landing page is built directly on the shared website. If the group does not have a shared website, then select a single individual to create the event landing page using FMG's landing page functionality instead.

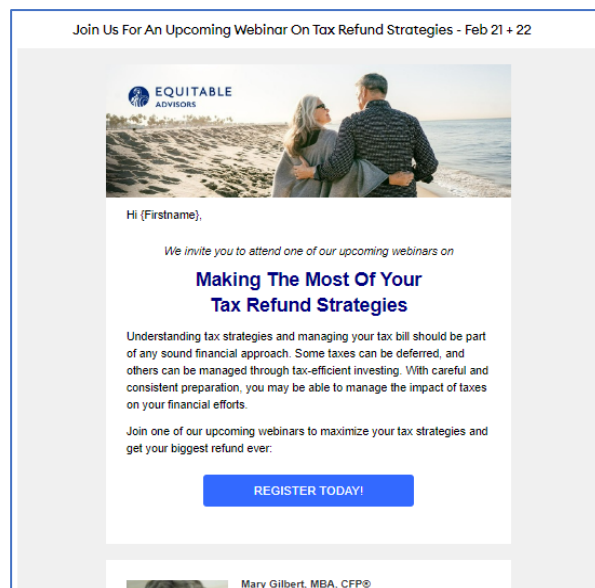
Once the landing page has been approved, we'd then recommend the follow approach for promoting the event:

1. Draft an invitation email or series of promotional emails
2. Submit the invitation email copy to AdTrax for review and approval
3. Share the approved copy, AdTrax approval number, and any appropriate disclosures with each member in the group.
4. Each group member could then send a custom email invitation, using the approved copy shared with them, from their personal marketing suite account to the contacts of their choice.

Be sure to include the AdTrax approval number and relevant disclosures in these emails for faster approval in the Marketing Suite platform.

For Branches: If you have a practice-wide event coming up and you'd like to make an email invitation available for all the FPs in your branch, then please reach out to AdvisorMartech@equitable.com who can help assist.

Note: *The above recommendation is a temporary approach for group event promotions. We are actively working with our vendor on a platform enhancement that will allow users to market across multiple books of business within a single account.*





What you need to know if you want to use Marketing Suite's event module

WHERE TO BEGIN

If you are hosting a client appreciation event:

Start by building your event in the Equitable Advisor Marketing Suite's event module. Please refer to [this knowledge guide](#) for detailed instructions and [this workflow on page 15](#) for an overview of the entire process.

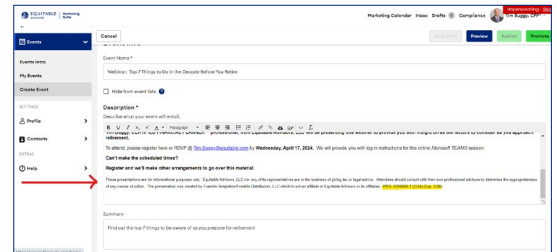
NOTE: if a DBA is holding the client appreciation event, then the following disclosure must be present:

- **[insert name of DBA]** is not owned or operated by Equitable Advisors, LLC, Member FINRA/SIPC (Equitable Financial Advisors in MI & TN).

If you are hosting another type of event (ex. seminar, webinar, etc.):

Start by creating your event materials (i.e. Invitation, PowerPoint presentation, reference documents, etc.) and submit them to compliance for review via AdTrax. **NOTE:** If you are using preapproved material, you can skip this step and start by creating the event in Equitable Advisors Marketing Suite's event module.

Once event materials are approved in AdTrax, create your event in Equitable Advisor Marketing Suite's event module. Please refer to [this knowledge guide](#) for detailed instructions. Be sure to include your **AdTrax approval reference number and all disclosures** in the 'Event Details' field within your event.



ONCE YOU'VE SUBMITTED YOUR EVENT IN MARKETING SUITE

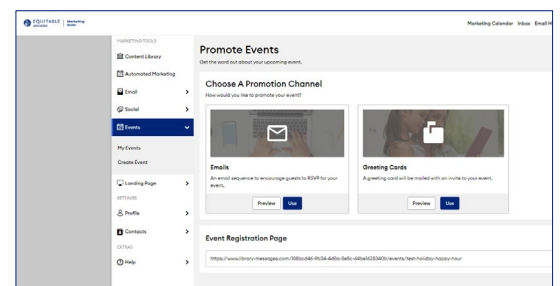
Seminar PinPoint Submission

Navigate to PinPoint to log your seminar/event within the G&E Module. Please ensure you reference or provide a screenshot/copy of the FMG Event created with your submission. We'd also recommend including your event's compliance case ID from FMG within the G&E submission. This will prompt the BCM to review the event in the Equitable Advisor Marketing Suite. The PinPoint G&E submission and FMG Event submission will be reviewed together. Once the Pinpoint G&E Submission is completed and approved the FMG Event will be approved so you may promote your event.

PROMOTION OF EVENTS

There are two ways to promote events in Marketing Suite

You can use the pre-defined email sequence and greeting cards available in the promotion section of the events module. Alternatively, you can choose to create your own custom email invitations and event reminders within the Email module of the Marketing Suite platform.



Regardless of how you decide to promote your event in the platform, your event details and landing page will need to be approved by compliance *prior* to sending out any promotional materials.

EVENTS CREATED OUTSIDE OF EQUITABLE ADVISORS MARKETING SUITE

You are not required to use Marketing Suite's event module for all events.

If you currently capture event registrations through another mechanism and want to continue following that process you may do so. Be sure to check with your BCM on any compliance approval questions for events handled outside of the Marketing Suite platform.



Example Event Registration Page



12
July

Join Us! Wine Tasting
And AI Event

DESCRIPTION

Please join [FP name] and [3rd Party Co-Host Name] as we taste a selection of Austrian wine and learn some interesting facts along the way while also shares compelling insights on continued advancements in AI, as well as strategic approaches for your organization to be at the forefront of search.

Your tasting box will be delivered by "Accent Group Solutions" tomorrow. Please let me know if you haven't received this by the end of the day tomorrow, and I'd be happy to assist.

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REGISTER

DATE AND TIME

Fri, July 12, 2024
7:30p - 8:30p EST

LOCATION

Microsoft Teams

NOTE

Microsoft Teams link will be sent following event form registration completion.

Event Registration

☒ Keep me posted about news and events

Additional guests

0

SUBMIT

To expedite compliance review, please include the following at the bottom of the description section...

- Include the GE or AGE # for the **approved PowerPoint presentation and full disclosure from that deck**
- Include the GE or AGE # of the **approved event invitation**
- If applicable, include **3rd party disclosures**; this type of disclosure is found at the bottom of your approved invitation