



QRC – Equitable Advisors Marketing Suite Advisor Custom Email

FOR PPG LEVEL ADVISORS, EVPs & DMs, OR EXP ADVISORS ONLY.

GENERAL OVERVIEW:

For Advisors that have achieved PPG status or above, by way of production or as part of a team, EVPs and DMs, and EXP Advisors are able to create custom emails in the Equitable Advisors Marketing Suite (Marketing Suite). Emails in the Marketing Suite are considered custom if they are: 1) Created as a brand new piece of content to be used by the FP, or 2) An FMG email that is materially changed (customized) in any way from what was originally uploaded to the Marketing Suite.

RESOURCES TO ASSIST IN CREATING CUSTOM CONTENT:

- **FMG Knowledge Base: Email | Edit Email Design (article)**
 - o [Link to article here](#)
- **FMG Insights Page (web page with various articles)**
 - o [Link to page here](#)
- **Getting Started With Email Marketing (word doc)**
 - o [Link to resource here](#)
- **Additional resources available:**
 - o Marketing Suite Partner Page: <https://micro.fmgsuite.com/equitable/resources/>
 - o EAVU: <https://eavu.pinpointglobal.com/LMS/Index>

Frequently Asked Questions

1. Can a newsletter be created in-platform?

Yes, newsletters can be created in both email and web. While there are a couple of different strategies on how to execute, depending on the content being featured, we encourage Advisors to check [FMG automations](#) and [monthly market insights](#) as a first source to see if what they are looking for is readily available in the platform. For those that still have needs beyond what FMG provides, outlined below are a few solutions:

- i. [Creating Custom Email Newsletters](#)
 1. Image email section: Insert a pre-created newsletter via image component, as the main content of the email. Note: May not render if a recipient does not manually “download images” or have settings to automatically download images
 2. Text, image, and widgets email sections: Advisors can create newsletters via a combination of text/headline/and image components in the Marketing Suite. This will ensure static copy that is rendered when sent. If [featured articles](#) are listed in advisor “blog” site or external site, text, button or images may link out to the featured article. Advisors can also leverage divider component for visual breaks.
 3. A combination of both of the above can be used: For example, can insert a portion of a pre-created newsletter as an image and “transpose” copy using text email sections



Frequently Asked Questions Cont.

2. Can I attach an existing newsletter or flyer to an email in FMG?

Advisors can link out to existing newsletters or [PDF flyers](#) (that have already been approved by Compliance in AdTrax) by hyperlinking the desired CTA (text, image, or button).

- i. For example: An Advisor might want to have an email that has body of text that does not change to introduce the newsletter with a CTA (call-to-action) button that links out to a newsletter. The Advisor can then create an email template and update the buttons' link with each new iteration (*note: updates to the button's link will require a re-review through the established compliance workflow*)

3. Will I be able to build a template one time and apply to different emails I send out?

Yes, an Advisor can [create a template](#) using the 'Your Email Templates' option under the "Email" tab once logged in. Here an Advisor can title the email template, add a subject line, build the body content of the email, and save the email template to your library for future use.

- i. Additionally, if an Advisor didn't go through the "Your Email Template" build process listed above, in the last step of the sending process for a typical email, an Advisor can click the checkbox next to "Think you might send this email again? Save it as a template for future use" to save that template to their library.

- ii. **Note:** all templates will require Compliance approval for use. See [this article](#) that explains how to submit to Compliance [here](#)

Choose Audience Choose Send Date Confirm

Confirm Your Details

Please double-check to make sure you're all set.

Your Email Will Be Sent To:
All my contacts [edit](#)

Your Email Will Be Sent On This Date:
Now (pending compliance approval) [edit](#)

Your Email Will Be Signed As:
☒ Mary Gilbert (Display Name)
☐ Equitable Advisors, LLC (Equitable Financial Advisors in MI & TN) (Company Name)

☒ Think you might send this email again? Save it as a template for future use.

Enter a title to help you remember what's in this email:
Custom Template - Client Appreciation

Never Mind Back Send Email

4. Can I share a template with other members of my team or firm?

No, the platform is currently configured in such a way where each Advisor must create the template and save it to their email library individually.

5. Am I able to continue using 3rd party materials or content I'm subscribed to (i.e. Nick Murray, Forefront Analytics, etc.)?

Yes – subscription-based content and 3rd party resources will need to be submitted in AdTrax for review and approval by each Advisor that intends to use that specific piece with clients. We'll no longer be able to make individual pieces available to specific reps for use in the platform. If an Advisor chooses to send approved 3rd party content through the Equitable Advisors Marketing Suite, the email itself will be considered custom content and therefore will follow the built-in Compliance approval process in the platform.

6. Can I create a custom email sequence?

- iv. Yes, you'll want to use the template created that's available in the platform. To get started, once you're logged in click 'Emails' at the top and, using the search bar, type in 'template'. This will pull up the [Templated Email Sequence](#) piece. Click 'Use' at the far right, click 'Edit Sequence' in the highlighted field at the top of the following page, and follow the instructions to create your email sequence. **Note: this will require Compliance approval before sending.**

7. Can I create product-specific emails, and if so, how are those submitted?

- iv. Custom commercial e mail content from any submitter referencing, discussing, or providing information about specific proprietary and/non proprietary products, services, or investments MUST BE submitted in AdTrax for Advertising Compliance review and approval before the email is created in FMG.