



SOCIAL MEDIA POLICY

Financial Planning Association of Greater Kansas City Social Media Guidelines

We expect everyone who participates in online communications to understand and to follow these simple but important Guidelines, which cover all social media platforms including but not limited to:

- Social Networking Sites (Facebook, LinkedIn)
- Micro-blogging sites (Twitter)
- Blogs (including company and personal blogs as well as comments)
- Video and Photo Sharing Websites (YouTube)
- Forums and Discussion Boards (Google Groups, Yahoo! Groups)
- Online Encyclopedias (Wikipedia)
- FPA Connect

Social Media at Work:

- We encourage our members and chapters to maintain an online/social media presence so we allow the use of work-related social media during office hours, but don't let it take focus from your primary responsibilities.
- Be cognizant of your behavior or your "friends" behavior on personal social sites. This is especially true if you allow members/customers to "friend" you on your personal sites. Learn how the sites work so you are aware who sees what. (If you have questions ask the P.R./Communications depts.). Also, know how to remove material from the view of others. In most situations, it's not your behavior but others associated with you that might paint a negative picture.
- All postings on a blog, wiki, or social networking site on behalf of the Company must be preapproved and sent by authorized employees. All other postings made by an employee on a blog, wiki, or social networking site are considered personal communications and are not Company communications. Use of personal mobile devices during work time should be kept to a minimum. Employees are personally responsible for the content they publish. Postings by an employee concerning the Company are not prohibited provided they comply with guidelines set forth below or in this handbook.
- If you post any comment that promotes or endorses Company products or services in any way, the law requires that you disclose that you are employed by the Company.
- You must comply with all applicable laws including copyright and fair use laws. You may not disclose any sensitive, proprietary, confidential, or financial information about Company. You may not post anything related to company inventions, strategy, financials, or products that have not been made public. Confidential information includes trade secrets or anything related to the Company's inventions, strategy, financials, or products that have not been made public, internal reports, procedures or other internal business-related confidential communications. Further detail is provided in the "Confidentiality" section of your employee handbook.
- When you use social media, use good judgment. We request that you be respectful of the Company, our employees, our customers, our partners and affiliates, and others. Avoid using statements, photographs, video or audio that reasonably could be viewed as malicious, obscene, threatening or intimidating, that disparages our employees,



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customers, partners and affiliates, or that might constitute harassment or bullying. Examples of such conduct might include offensive posts meant to intentionally harm someone's reputation or posts that could contribute to a hostile work environment.

- Nothing in the guideline is meant to interfere with employees' right under federal law to engage in protected and concerted activity, including employees' ability to discuss terms and conditions of their employment.

When Communicating on Behalf of FPA:

- Administration of FPA's Social Media sites will be overseen by the P.R./Communications department, in cooperation with certain departments on specific projects.
- Do not speak on behalf of FPA unless authorized to do so.
- Any offensive or objectionable material/comments must be brought to the attention of the P.R./Communications department immediately.
- Before creating a new social media vehicle (new Twitter account, Facebook page, etc.), please contact the P.R./Communications team. It is important that FPA social media channels be effective, timely, and relevant, and the team will work with staff to determine the most appropriate vehicle for reaching various FPA audiences.
- If someone responds to something you've said, be responsive and follow-up quickly (e.g., 24 hours). If you say something in error, go back and update it with the correct information.
- Do not reply to posts regarding FPA without consulting the P.R./Communications department.
- Only disclose publicly available information. The P.R./Communications Department will choose what vehicles are used for announcements, and the timing of those announcements.
- Be aware of time management. The various social media outlets can be time consuming. Manage time and remember to use the media in ways that will benefit the association, not for personal purposes.
- Be professional in your posting, writing style and content. Since postings can be seen by many, use professional language and style in your writing. Keep all photos or graphics relevant and professional.
- Identify yourself and your position at FPA. Comment and speak only to items you have expertise.
- All postings must adhere to FPA branding and style guidelines.
- It is not appropriate to anonymously post anything regarding FPA.
- Do not get pulled into a scenario where FPA is attacked or spoken of negatively. If you feel action is needed, please forward the information to the P.R./Communications department.
- Know the rules of the forum or site; follow those rules.
- Avoid inappropriate or emotionally charged conversations of any kind.
- Adhere to all FPA privacy policies and do not publicly share personal/ private information of a member/employee/sponsor, the association, or any third party that has disclosed information to FPA. If you have a question, refer to the P.R./Communications department



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- When posting photos/quotes please ensure you're showing FPA representatives in the best professional light. Something that might be fun to post on your personal site may not be something your associates want shared publicly. When in doubt, always ask the person for permission to post their photo/quote publicly.
- Follow all FPA conduct policies. You are a representative of FPA whether you are on a personal or a business website.
- Show proper respect for the laws governing copyright and fair use of copyrighted material owned by others, including FPA's own copyright and trademarks.

When Using Social Media Personally:

- You must receive written permission from the P.R./Communications team prior to discussing FPA-related information across your personal sites.
- If you have permission to discuss FPA-related information across your personal social media sites, you should disclose on your "About" page or bio that you are a FPA employee and what your responsibilities include. Please also indicate that your opinions do not represent official positions of FPA.
- You may not share information that is confidential/ proprietary to FPA, or of third parties that have shared their information with FPA.
 - If you have any question about whether information has been released publicly or doubts of any kind, speak with the P.R./Communications department before releasing information.
- Don't post FPA-owned content on your personal site unless you receive permission first. For example, it is inappropriate to post FPA-owned photographs on your personal sites.
- FPA logos and trademarks may not be used.
- Always be transparent about who you are and who you represent. Use your real name, identify that you work for FPA and what your role is. Provide your own unique and individual perspective.
- You represent FPA at all times and you must assume that your social media usage is visible to members, chapter leaders, sponsors, etc. Be sure to manage what and with whom you are sharing. Keep in mind that while we all have the occasional work frustration, Facebook and Twitter are not the best venues in which to air them as those comments are available to members and coworkers.
- No remarks that are off topic or offensive. Always demonstrate respect for others' points of view, even when they're not offering the same in return. Never pick fights and always take the high road. If you are sharing a negative experience or commenting on a brand or individual, please try to do so in a constructive way.
- All copyright, privacy, and other laws apply.
- Be smart about protecting yourself, your privacy, and FPA's confidential information. What you publish is widely accessible and will be around for a long time so consider the content carefully. Google has a long memory.
- If you are developing a site or writing a blog that will mention our company and / or our initiatives, partners, customers, and competitors, as a courtesy to FPA, please let your manager know that you are writing them.