

SLICK

Advisor Branded Marketing Content FAQs

With over 2,500 items (and growing) available through Advisor Branded Marketing (ABM), we understand that you might have some questions about the content. We've compiled some of the most frequently asked questions for your reference.

When is new content released?

New content is released on a regular basis from weekly to quarterly depending on the type of content.

Content Campaigns

One new content campaign, a set of related content materials, is released each month and always features a new video.

Industry Insights

Articles related to current events and the markets are released on a weekly basis to the "Featured" section of the Content Library, which also includes the newest content. As new articles are released, older articles are moved to the Industry Insights section so that they are always available.

Market Commentary

Typically available two to three days after the quarter ends. There is no fourth quarter commentary, instead a year-in-review article is available at the end of the year.

Newsletters

We offer nine different newsletters on topics geared toward your clients' most pressing needs:

- 1. Taxolutions** [Quarterly]
Newsletter offering individuals and business clients articles on tax planning.
- 2. Benefit Plan Trends** [Quarterly]
News about critical issues affecting group life/health, disability, dental, retirement plans, and more.
- 3. Financial Business Edge** [Quarterly]
Focuses on topics of interest to business owners and executives covering a variety of issues.
- 4. Financial Planning Strategies** [Quarterly]
A general newsletter that covers personal finance, estate planning, college funding, insurance topics, and more.
- 5. Ideas for Living Well** [Quarterly]
Newsletter offering prospects and clients articles on ways to improve their lives.
- 6. Prosperity** [Quarterly]
A quarterly update on financial and family issues for women.
- 7. NextGen Investing** [Quarterly]
Quarterly commentary and investment related news for young investors.
- 8. 21st Century Retirement** [Bi-Monthly]
Presents topical, informative articles on a wide range of retirement planning issues.
- 9. Financial Insider Online** [Monthly]
A monthly newsletter focusing on economic and investment topics.

Who creates content?

Advisor Branded Marketing content is developed by eMoney and in partnership with Financial Media Exchange (FMeX). Content from Financial Media Exchange includes their logo.

Is content FINRA approved?

While we keep FINRA rules and guidelines in mind when developing content, the content has not been FINRA reviewed or approved.

How do I receive compliance approval for content?

ABM users should continue to follow their normal content review processes with their compliance officers or managers. To assist ABM subscribers with this process, we have created a compliance resource website where storyboards and videos may be downloaded so that they can be submitted for review.

URL: <http://info.emoneyadvisor.com/abm-compliance>

Password: eMoney2018comply

What are the permissible uses for the content?

Content can be used in a variety of ways, as long as it is not resold. Content may be shared through print, websites, social media, blogs, email, or presentations.

Videos can not be used in live broadcast format (i.e. television or radio commercials).

Can I make changes to content?

You may republish in full any FMeX-original images (such as charts, graphs, cartoons, infographics), videos, or slides by copying or embedding them and including them in your content, as long as you honor the Content Attribution Policy below.

Content may be used in entirety or reference or quote up to 75 words of any text content (facts, figures, quotes, etc.) in your own blog articles, presentations, documents, etc. as long as you honor the Content Attribution Policy below.

Videos can not be altered and must be used in their entirety.

Content Attribution Policy

Attribute FMeX or Advisor Branded Marketing as the source and link to the original source you're referencing.

Example: "Article Title." Source. Date Month Year Published. URL.

"The Tour de France – Lessons for Investors." FMeX. 2018. <https://fmexcontent.s3.amazonaws.com/10657/10657.pdf>

Where can I submit suggestions for content I would like to see in Advisor Branded Marketing?

We would love to hear your suggestions for content topics. Suggestions can be submitted through UserVoice by clicking the Request a Feature link in your footer.

Still have questions? Give our customer support team a call at 888-362-8482 Monday through Friday, 8:00 a.m. to 8:00 p.m. ET.