

Bamboo Content FAQs

With over 2,500 items (and growing) available through Bamboo, 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.

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 newsletters on topics geared toward your clients' most pressing needs:

- 1. Financial Business Edge** [Quarterly] Focuses on topics of interest to business owners and executives covering a variety of issues.
- 2. Ideas for Living Well** [Quarterly] Newsletter offering prospects and clients articles on ways to improve their lives.
- 3. NextGen Investing** [Quarterly] Quarterly commentary and investment related news for young investors.
- 4. Financial Insider Online** [Monthly] A monthly newsletter focusing on economic and investment topics.

Who creates content?

Bamboo 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?

Bamboo users should follow their normal content review processes with their compliance officers or managers. To assist Bamboo subscribers with this process for video content, a compliance version of the video and storyboard are available for download within the app.

Simply log into Bamboo and locate the video you need to submit for compliance review. Below the video, you'll find two options - **Compliance Video** and **Storyboard**.

Select **Compliance Video** to download a watermarked compliance version of the video. The watermark states "For Compliance Use Only."

Select **Storyboard** to download a PDF that includes the script and corresponding video imagery.

Note: Both the compliance video and storyboard files are intended for compliance review purposes and should not be distributed to end-clients.

If using Automated Campaigns, a Compliance Package document is available upon scheduling your campaign within the app. The Compliance Package includes all content items that are part of the campaign.

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 Bamboo 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 Bamboo?

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.