

Social Media & Advertising Policy Guidelines

FOR AMERICAN FINANCIAL EDUCATION ALLIANCE MEMBERS



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Introduction

At AFEA, our mission is to empower Americans to take control of their finances by providing local communities with objective financial education. We believe that, in business, transparency, integrity and honesty leads to responsible conversation and engagement. As leaders in the industry with a vision of improving financial literacy, it is incumbent to treat AFEA members, staff and clients with such respect.

Online collaboration platforms have changed the way professionals work and engage with each other. There are so many opportunities to connect, promote and amplify the message of AFEA, to engage current members, and attract new members and clients. It is our responsibility to prepare ourselves and our members to deliberately and strategically utilize these resources to expand awareness of our brand and increase our organization's influence in a way that accelerates of our mission's fulfillment.

AFEA is committed to exploring how online discourse through social media can empower us as a professional association of financial educators. It is our goal to set guidelines and best practices for providing you the tools to be masses of communicators.

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Advertising All advertising that is published while representing AFEA and events **MUST** be pre-approved by AFEA. You are welcome to distribute any material that is directly posted by AFEA. If you want to publish any content while representing AFEA that is **NOT** previously distributed by our organization, please **submit content to your Academic Coordinator** for pre-approval from an Executive Member. Content may not be posted without prior authorization.

Best Practices We encourage our members to learn and share our best practices that are distributed by AFEA. Procedures are in place to determine best practices for our organization and our members. If in doubt, please refer to this document and always use your best judgment. If you are still unclear as to the propriety of a post, it is best to refrain from posting and seek the guidance of the Executive Team, which is ultimately responsible for the development, modification, and publication of best practices and guidelines.

Confidential and Proprietary Information You must make sure you do not disclose or use AFEA confidential or proprietary information in any online social media platform. This may include information regarding the development of course materials, know-how and services. Additionally, internal reports, policies, procedures or other internal organizational-related confidential communications should not be posted. More information can be found on page 7.

Copyright and Fair use Laws A detailed explanation of copyright and fair use laws can be found on page 7.

Corporate Social Media Accounts No chapter, leader, member or other non-employee representative of AFEA, nor anyone without any association with AFEA may create, maintain or manage an AFEA-branded online presence, including marketing/advertising (with the normal exceptions of professional affiliation depicting their formal role, for example indicated as a professional or volunteer experience on a personal LinkedIn profile) without express written permission from the Executive Team.

Governing Documents It is important that AFEA members are familiar with the organizations' governing documents. These can be found on page 5.

Media Inquiries If you see any misrepresentation by media, analysts or by other bloggers about AFEA, please report your concerns to your Academic Coordinator. Please inform of the situation so that a cohesive communication strategy can be developed. Please be sure to direct all media inquiries immediately.

Member Social Media Guidelines Specific guidelines for social media platforms are listed in detailed on pages 5. Only those officially designated by AFEA have the authorization to speak on behalf of the association(s). No chapter, leader, member or other representative of AFEA, nor anyone without any association with AFEA may create, maintain or manage an AFEA-branded online presence (with the normal exceptions of professional affiliation depicting their

formal role, for example indicated as a professional or volunteer experience on a personal LinkedIn profile) without express written permission from the Executive Director. **If representing AFEA, you may share from its corporate account, but cannot provide commentary or create content, including marketing/advertising, without express prior written consent from the Executive Director. No marketing outside of AFEA-approved vendors is allowed.**

Mission AFEA's mission is to empower Americans to take control of their finances by providing local communities with objective financial education. We ask that topics of conversation are in alignment with this mission when representing AFEA. You must clearly identify if you are expressing your personal opinion when representing AFEA. Use caution when speaking about other organizations and avoid unnecessary or unproductive arguments. In all areas of public discussion, make sure that what you are saying is factually correct.

Personal Responsibility AFEA believes in authenticity, honesty and transparency. It is your responsibility to be mindful of what you publish on-line, whether in a blog, social media site or any other form of user-generated media. Protect your privacy and take care to understand a site's term of service. If you identify yourself as an official representative of AFEA, you must make it clear that you are speaking for yourself and not on behalf of AFEA unless express permission is granted to do so. It is important to claim your own voice and use a disclaimer if necessary (see page 6). AFEA believes in encouraging personal responsibility and trust in all relationships. As an organization, AFEA trusts and expects AFEA members to exercise personal responsibility whenever participating in social media. This includes not violating the trust of those with whom they are engaging. AFEA representatives should not use this media for covert marketing or public relations on behalf of AFEA. If and when members of AFEA's membership engage in advocacy for the association have the authorization to participate in social media, they should identify themselves in their official role or capacity.

Prior Approval All content that is published while representing AFEA MUST be pre-approved by AFEA. You are welcome to distribute any material that is directly posted by AFEA. If you want to publish any content while representing AFEA that is NOT previously distributed by our organization, you MUST submit content to your Academic Coordinator in advance for pre-approval. Content may not be posted without prior authorization.

Value AFEA's brand is best represented by its members and everything you publish online reflects upon the organization. Use any blogs and social networks that are AFEA-owned domains or branded accounts in a way that adds value to

AFEA's brand and reputation. It adds value if it helps to improve your knowledge or skills; if it directly or indirectly contributes to the improvement of AFEA's brand and presence; if it builds a sense of community; or if it promotes AFEA's values and/or mission. Specific recommendations can be found on pages 8 and 9.

Website AFEA's website is www.myafea.org.



Website Posting Guidelines

Website Publishing Guidelines When posting information about AFEA-related activities online, please use the following steps:



1. Mention Affiliation

Always reference your affiliation with AFEA.



2. Emphasize AFEA's Mission

AFEA's mission is to empower Americans to take control of their finances by providing local communities with objective financial education.



3. Highlight Events

Feel free to promote your AFEA events that have been published by AFEA staff.



4. Promote Socially

You may reshare information that has been published by AFEA's corporate office but cannot provide commentary without express prior written consent from AFEA.

AFEA recognizes the importance of a public and private “social media strategy” so it took active steps in 2018 to determine not only industry best practices for professional membership organizations, but also for AFEA and its members in particular. We now advocate for the responsible involvement of our members in this rapidly growing environment of relationship, learning and collaboration in a very public medium. Any updated versions or revisions to this policy and guideline will be distributed to AFEA members and be available online.

AFEA Social Media Guidelines No marketing outside of AFEA-approved vendors is allowed. **Note:** these best practice guidelines should be followed whether you are sharing information about AFEA on a branded account or via your personal social media pages, particularly if you identify yourself as a chapter president or member.

- **Understand AFEA corporate accounts.** Know and follow AFEA's Bylaws & Privacy Policy and these Social Media Guidelines.
- **Assume personal responsibility.** AFEA members are personally responsible for the content they publish on-line, whether in a blog, social media site or any other form of user-generated media. **Be mindful that what you publish could be permanently public.** Protect your privacy and take care to understand a site's term of service.
- **Be who you are and identify yourself.** Be aware of your association with AFEA in online social networks. If you identify yourself as an official representative of AFEA, ensure your profile and related content is consistent with how you wish to present yourself to colleagues and other professional contacts. This includes your name and, when relevant, your role at AFEA, when you discuss AFEA-related matters. **You must make it clear that you are speaking for yourself and not on behalf of AFEA unless express permission is granted to do so.**
- **Claim your own voice and use a disclaimer.** If you publish content online relevant to AFEA in your personal capacity – even on a site that may be generally deemed as the use of your personal voice (such as Facebook) – it is best to use a disclaimer such as: "The postings on this site are my own opinions and do not necessarily represent AFEA's positions, strategies or opinions." OR "My updates (tweets, opinions, etc.) are my own" for those sites with limited field size.
- **Maintain your silence.** If you publish content online relevant to AFEA in your personal capacity, even on a site that may be generally deemed as the use of your personal voice (such as Facebook,) it is best to use a disclaimer such as: "The postings on this site are my own opinions and do not necessarily represent AFEA's positions, strategies or opinions." OR "My updates (tweets, opinions, etc.) are my own" for those sites with limited field size.



Advertising Guidelines

Obtain Prior Approval All advertising that is published while representing AFEA and events **MUST** be pre-approved by AFEA. You are welcome to distribute any material that is directly posted by AFEA. If you want to publish any content while representing AFEA that is **NOT** previously distributed by our organization, you **MUST** submit content to your Academic Coordinator to obtain approval from an AFEA Executive in advance for pre-approval. Content may not be posted without prior authorization.



Protecting AFEA's Members, Staff and Clients

Use a Disclaimer "The postings on this site are my own opinions and do not necessarily represent AFEA's positions, strategies or opinions." OR "The opinions and positions expressed are my own and do not necessarily reflect those of AFEA." OR "The postings on this site are my own opinions and do not necessarily represent AFEA's positions, strategies or opinions." OR "My updates (tweets, opinions, etc.) are my own" for those sites with limited field size.



Even when you are talking as an individual, people may still perceive you to be talking on behalf of AFEA.



Be upfront and explain that you are an AFEA member if you blog or discuss topics related to AFEA. For instance, in your own blog, the standard disclaimer should be prominently displayed.



Make it clear that what you say there is representative of personal views and opinions, and not necessarily the views and opinions of AFEA, whenever you publish content for any form of digital media that is not as an official AFEA spokesperson.



You should use your best judgment to position your comments appropriately if a site does not afford you enough space to include this full disclaimer.



It is best to use a disclaimer if you publish content online relevant to AFEA in personal capacity, even on a site that may be generally deemed as the use of your personal voice, (such as facebook.)

Respect Copyright and Fair Use Laws For AFEA's protection and as well as your own, it is critical that you show proper respect for the laws governing copyright and fair use of copyrighted material owned by others, including AFEA's own trademarks, copyrights and brands. You should never quote more than short excerpts of someone else's copyrighted work. And it is a good general practice to link to others' work. Keep in mind that laws will be different depending on where you live and work.

Uphold Your Silence to Protect Confidential and Proprietary

Information Traditional boundaries between internal and external communication are now blurred with social media. Be thoughtful about what you publish, especially on external platforms. You must make sure you do not disclose or use AFEA confidential or proprietary information in any online social media platform. AFEA confidential and proprietary information may include information regarding the development of course materials, know-how and services. Additionally, internal reports, policies, procedures or other internal organizational-related confidential communications should not be posted.

- Do not provide AFEA's or a member's or client's confidential or other proprietary information to anyone or post anywhere. Never discuss AFEA organizational performance or other sensitive matters about organizational results or plans publicly, including by writing, posting, audio or video.
- Do not post information about a person or another organization unless you have the right to do so, taking into account intellectual property and privacy concerns. For example, ask permission before posting someone's picture in a social network or publishing in a blog a conversation that was meant to be private, whether or not you disclose who you were speaking with.
- Some topics relating to AFEA are sensitive and should never be discussed, even if you are expressing your own opinion and using a disclaimer. For example, you must not comment on, or speculate about things like AFEA's future organizational performance, AFEA's business plans, unannounced initiatives, potential mergers, or similar matters involving AFEA's competitors.

- This applies to anyone including conversations with the press or other third parties (including friends).
- If you are unsure of the sensitivity of a particular subject, seek advice from AFEA staff before talking about it or simply refrain from the conversation.
- AFEA policy is not to comment on rumors in any way about these issues. You should merely say, "No comment" to rumors. Do not deny or affirm them (or suggest the same in subtle ways), speculate about them or propagate them by participating in "what if" type conversations.

Respect Your Audience and Other AFEA Members Remember that AFEA is a national professional association whose employees, members and clients reflect a diverse set of cultures, customs, values and points of view. Do not be afraid to be yourself; but do so respectfully.

- For example, if you are blogging on an AFEA-owned property, focus on subjects that are related to business and leadership, topics that further our mission.
- Avoid controversial or polarizing topics that do not further the mission of AFEA. This includes not only the obvious (no ethnic slurs, personal insults, obscenity, etc.) but also proper consideration of privacy.
- Be thoughtful about the types of information that you share, which may inadvertently lead others to deduce which employees, members or clients that you are working with. This might include travel plans or publishing details about your current location or where you are working on a given day. Furthermore, your blog or online social network is not the place to conduct confidential business.



Personal Responsibility Best Practices

AFEA is increasingly exploring how online discourse through social media can empower us as a professional association. These interactions can provide an enhanced network to serve as masses of communicators. Through these interactions, AFEA's greatest asset—the expertise and value of its members—can be shared with other members, clients and potential new clients to continue to grow the association toward our goal of providing objective financial education. It is in AFEA's interest and for each AFEA representative to be aware of and participate in this sphere of information, collaboration and exchange of best practices:

Add Value AFEA's brand is best represented by its members and everything you publish online reflects upon the organization. Use any blogs and social networks that are AFEA-owned domains or branded accounts in a way that adds value to AFEA's brand and reputation. If it helps to improve your knowledge or skills, other AFEA members, staff, potential members, clients or potential clients; if it directly or indirectly contributes to the improvement of AFEA's brand and presence; if it builds a sense of community; or if it helps promote AFEA's values and/or furthers AFEA's mission, then it is adding value.

- **It is best to stay within your sphere of expertise.** Whenever you are presenting something as fact, make sure it is fact and AFEA-approved.
- **Always consider privacy.** Though not directly AFEA-related, background information you choose to share about yourself, such as information about your family or personal interests, may be useful in helping establish a relationship between you and your clients, but it is your choice whether to share.
- **If AFEA is misrepresented, report it.** If you see any misrepresentation by media, analysts or by other bloggers about AFEA, please report your concerns to your Academic Coordinator. Please inform of the situation so that a cohesive communication strategy can be developed.
- **Respond to your own mistakes first.** If you make an error, be up front about your mistake and correct it quickly, as this can help to restore trust. If you choose to modify content that was previously posted, such as editing a blog post, make it clear that you have done so.
- **Use your best judgment.** Remember to always use good judgment and common sense in deciding what you publish. If you are considering publishing something that makes you even the slightest bit uncomfortable, review the suggestions above and reevaluate. If you are still unsure, and it is related to AFEA business, feel free to discuss it with AFEA staff. Ultimately, however, it is your sole responsibility for what is posted to your forms of online social media.

To Learn As a professional association dedicated to empowering and develop leaders of character, we believe in the importance of open exchange between AFEA staff, its members and clients. Social media is an important arena for organizational and individual development, not only through traditional learning, but by modeling best practices of professional leadership and community building.

To Contribute AFEA, as a professional organization, makes important contributions to Americans and their finances. Because our activities provide transformational insight into financial literacy, it is important for AFEA and its official representatives to share with an audience the exciting things we're learning and doing together.

Summary

Advertising & Promotions

- Obtain AFEA approval before publishing any advertising or promotional content representing AFEA.
- Only share official AFEA-created/promoted materials unless additional content is pre-approved.
- Submit original AFEA-related content for approval before posting.
- Do not use non-approved marketing vendors.

Social Media Use

- Only authorized individuals may speak on behalf of AFEA.
- Do not create/manage AFEA-branded social media accounts without written permission.
- You may reshare official AFEA posts but cannot add commentary without approval.
- Clearly identify your affiliation with AFEA when posting AFEA-related content.

Personal Responsibility

- State clearly when opinions are your own and not AFEA's.
- Use a disclaimer when discussing AFEA in a personal capacity.
- Be honest, respectful, and professional in all online interactions.
- Exercise good judgment before posting.

Confidentiality & Privacy

- Never share confidential or proprietary AFEA information.
- Do not discuss internal reports, policies, business plans, or sensitive organizational matters publicly.
- Do not post photos or personal information about others without permission.
- Protect client/member privacy at all times.

Content Standards

- Ensure all statements are factual and accurate.
- Stay aligned with AFEA's mission when representing the organization.
- Avoid controversial or polarizing topics unrelated to AFEA's mission.
- Do not engage in unnecessary arguments or unprofessional disputes online.

Brand Protection

- Post content that enhances AFEA's reputation and mission.
- Report any misrepresentation of AFEA to leadership immediately.
- Correct mistakes promptly if inaccurate information is posted.

General Best Practices

- Stay within your area of expertise when discussing financial education topics.
- Follow AFEA bylaws, privacy policy, and governing documents.
- When unsure whether something is appropriate to post, seek guidance before posting.



American Financial Education Alliance

Please contact your Academic Coordinator with any questions, comments or concerns or to obtain pre-approvals from an Executive.