

Creating a Business Page on Facebook

Social media outlets offer an effective way to increase existing client touches and prospect new clients.

All too often, advisors view social media as a box they have to check off because that's just what everyone does, right? But effective marketing on social media is so much more than that.

It all comes down to connecting with people.

This training document explains how to create a business page on Facebook.

Create your Business Page

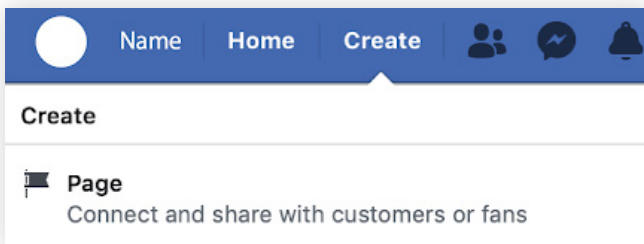
To set up a business page on Facebook, you must first have a personal Facebook account. Updates made to your business page are kept separate from your personal account.

To create your business page:

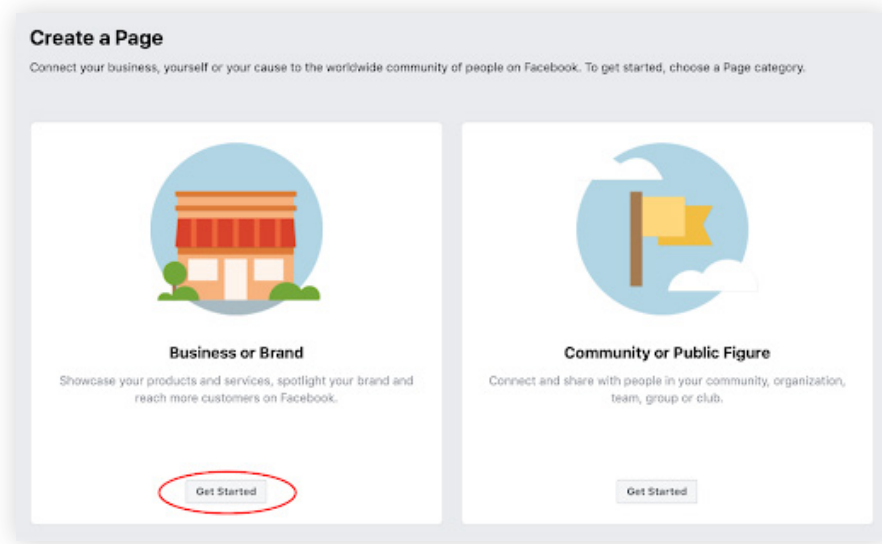
- 1 Login to Facebook using your personal login credentials.
- 2 In the upper right corner, click "Create."



- 3 A drop down menu will appear. Click "Page."



- 4 Select the “Business or Brand” option.



- 5 Enter the name of your firm
- 6 Page Category: Begin typing the word “Financial” and select “Financial Service” from the list of options. You can add additional categories later.
- 7 Enter address
- 8 Click to “Continue”

Update your Business Profile

With the exception of required Compliance disclosures, you can decide what information to provide on your business profile. Here’s some suggestions:

Add a Profile Picture and Cover Photo

- 1 Click the “Add a Picture” link to select a profile picture for your business page. We recommend using your firm logo for quick and easy brand identification.
- 2 Click the “Add a Cover” link to select a cover photo for your business page. Use a photo that further identifies your company, such as, your building or a team picture.

Add a Contact Button

- 1 Click to “Add Button”
- 2 Select “Contact Us”
- 3 Enter the website where you want to send visitors that click the button – likely your appointment or content page.
- 4 Click to “Add Button”

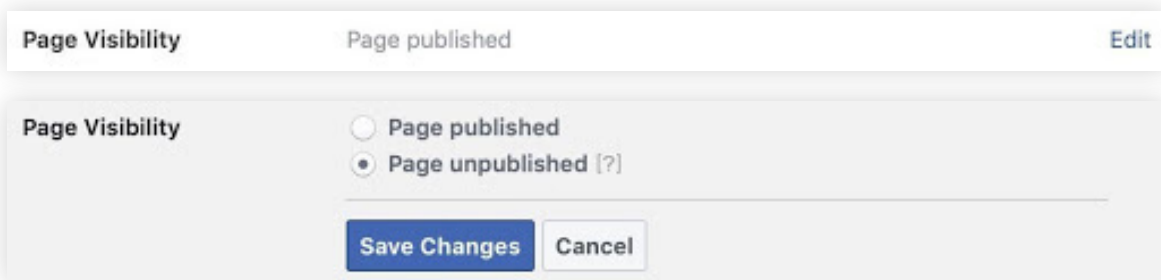
Update the About Section

- 1 Select the “About” section on the left side of the page.
- 2 Start Date – Enter the date your company was founded.
- 3 Phone Number – Enter your business phone number.
- 4 Email – Enter your business email address.
- 5 Website – Enter your company website.
- 6 About - Incorporate a brief overview of your firm history and mission statement.
- 7 Impressum – Include the required compliance disclosures in this section. You can also include your disclosure at the bottom of the About section.
- 8 Categories – Add additional categories, such as, Financial Service and Financial Planner.
- 9 Story – Add a long description to further explain your firm history, service offering and value proposition.
- 10 Click to “Edit Page Info”
- 11 Location – Enter your address so it is identifiable on a map. Be sure to click to “Save Changes”
- 12 Hours – Enter your hours of operation. Be sure to click to “Save Changes”.

Update Your Page Settings

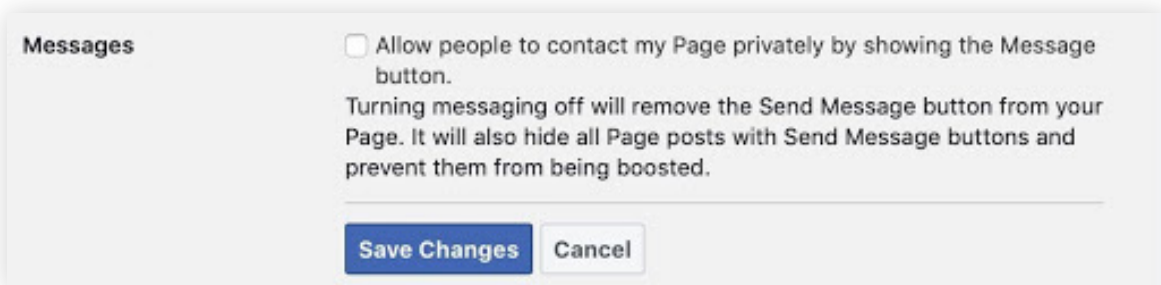
From your business homepage, click the “Settings” tab and adjust the below settings on your page.

- 1 Page Visibility – If your page needs to be reviewed by compliance, click “Edit” and select the “Page Unpublish” option so your page is not visible until approved. Once the compliance department has approved your profile, this box can be unchecked so it can be seen by the public.



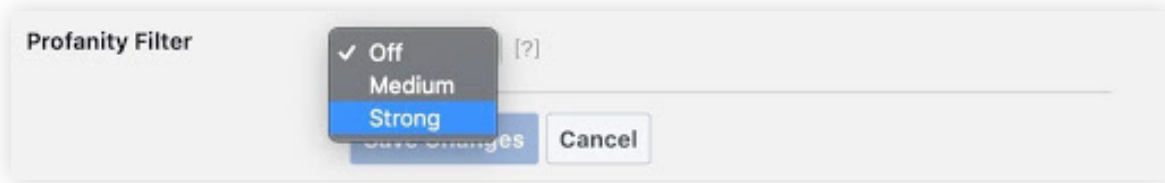
The screenshot shows the 'Page Visibility' settings for a Facebook page. At the top, it says 'Page published' with an 'Edit' link. Below, the 'Page Visibility' section has two radio button options: 'Page published' (which is currently selected) and 'Page unpublished [?]'. At the bottom of this section are 'Save Changes' and 'Cancel' buttons.

- 2 Messages – You can also shut off messages if you'd like by clicking “Edit” and unchecking the box that allows anyone to privately message your firm.



The screenshot shows the 'Messages' settings for a Facebook page. It features a checkbox labeled 'Allow people to contact my Page privately by showing the Message button.' Below the checkbox is a warning: 'Turning messaging off will remove the Send Message button from your Page. It will also hide all Page posts with Send Message buttons and prevent them from being boosted.' At the bottom are 'Save Changes' and 'Cancel' buttons.

- 3 Profanity Filter – Click “Edit” and select “Strong”.



Submit your Facebook Page to Compliance for Approval

Some compliance teams will ask you to submit a PDF of the “About” section of your Facebook page, along with registering with an archiving tool.

To generate a PDF of your Facebook account:

- 1 From your Facebook homepage, select “About”.
- 2 Expand the longer sections of your profile by clicking “See More”.
- 3 Click to “Print” from your browser. The location of the print option varies from browser to browser, this document displays the location in Chrome.
- 4 Choose the “Save as PDF” option and save the document to your local machine.
- 5 Submit the PDF to your respective compliance team.
- 6 Once approved you can make your page visible to the public.

Promote your page to your Facebook friends and larger audiences to gain more likes. Encourage your team members to do the same and share with their Facebook friends as well!



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