

# Creating a Business Account on Twitter

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.

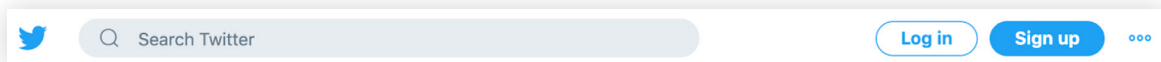
It all comes down to connecting with people.

This training document explains how to create a business account on Twitter.

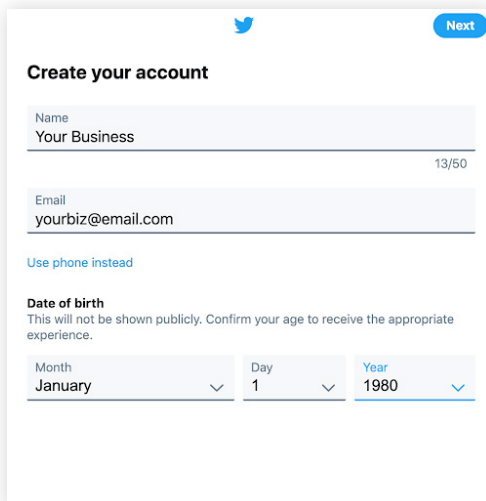
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## Create your Business Profile

- 1 Go to <https://twitter.com>
- 2 Click to "Sign up."
- 3 Create your Business Profile
- 4 Full Name - Enter your Company Name.
- 5 Email - Enter your email address.
- 6 Password - Select a password.
- 7 Click to "Sign up".



- 8 Enter your company name, email and birthday.

A screenshot of the Twitter "Create your account" form. The form is titled "Create your account" and has a "Next" button in the top right corner. It contains three main input fields: "Name" with the text "Your Business" and a character count of "13/50"; "Email" with the text "yourbiz@email.com"; and "Date of birth" with a note "This will not be shown publicly. Confirm your age to receive the appropriate experience." Below the date of birth field are three dropdown menus for "Month" (January), "Day" (1), and "Year" (1980). There is also a link "Use phone instead" below the email field.

- 9 Confirm your account – you'll receive an email.
- 10 Select a username for your account.
  - **“Usernames must be fewer than 15 characters in length and cannot contain ‘admin’ or ‘Twitter’, in order to avoid brand confusion.”**
- 11 Create a password.
- 12 Upload your logo as your profile photo (or your photo if it's an individual advisor account).
- 13 Describe your company using your mission statement.
- 14 Choose whether or not to import email contacts to follow anyone you know who may be on Twitter. This is a great way to connect with other Twitter users.
- 15 Select from the list of interests so Twitter can recommend people to follow.

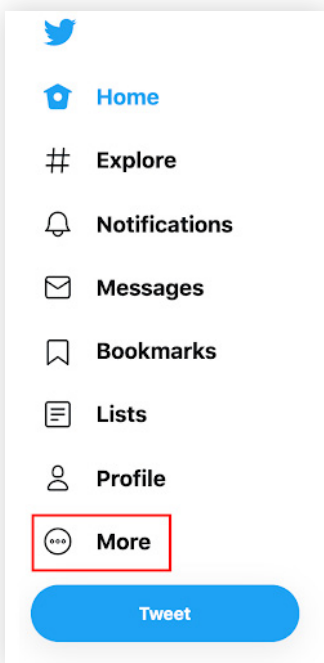
Your Twitter profile is now created! You will need to go to your email account to confirm your Twitter profile.

## Customize Your Profile and Design

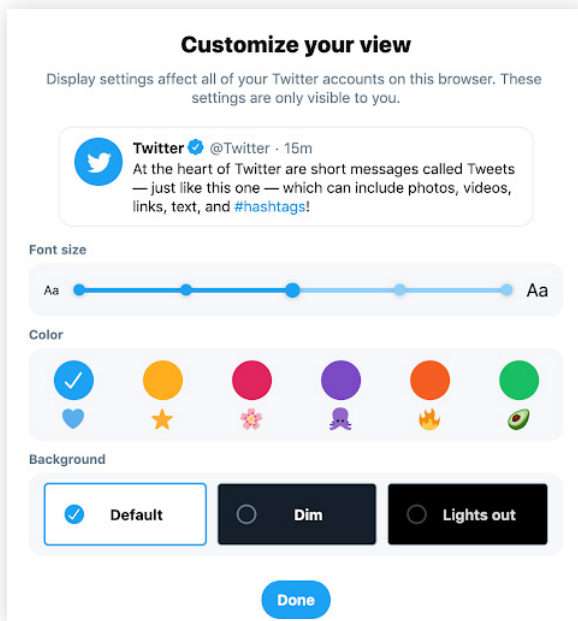
Use the tips below to customize your page design, profile and settings.

### Customize Your Page Design

- 1 Click “More” in the lower left corner and select “Display”.



- 2 Select what color scheme and background you prefer.
- 3 Then click “done.”



## Update Security and Privacy Settings

- 1 Click “More” in the lower left corner and select “Settings and Privacy”.
- 2 Then select “Privacy and safety”.
- 3 Initially you will need to checkmark the “Protect My Tweets” option if your profile needs to be compliance approved. Once approved you can unselect this option so everyone can view your tweets.

| Settings                | Privacy and safety  |
|-------------------------|---|
| <b>@yourbizusername</b> | <b>Tweets</b>   |
| Account >               | Protect your Tweets <input checked="" type="checkbox"/>   |
| Privacy and safety >    | Only show your Tweets to people who follow you. If selected, you will need to approve each new follower. <a href="#">Learn more</a> |
| Notifications >         | Location information >  |
| Content preferences >   | Photo tagging Off >   |

- 4 Then, if you’d like to add a two-factor authentication log-in process, click “Privacy and safety” again. Then, “security”. This will further protect your account from being hacked.

| Settings                | ← Security   |
|-------------------------|--|
| <b>@yourbizusername</b> | <b>Two-factor authentication</b>   |
| Account >               | Two-factor authentication >  |
| Privacy and safety >    | Protect your account from unauthorized access by requiring a second authentication method in addition to your Twitter password. You can choose text message, authentication app, or security key. <a href="#">Learn more</a> |
| Notifications >         |  |
| Content preferences >   | <b>Additional password protection</b>  |

- 5 Then check the box by “Text message” to receive a text every time you log in.

### Two-factor authentication

Text message

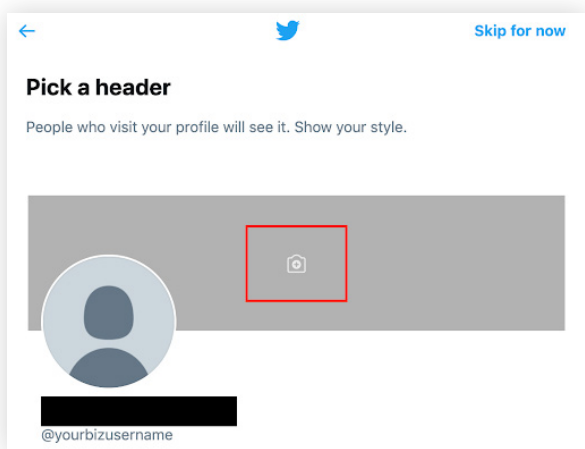
Use your mobile phone to receive a text message with an authentication code to enter when you log in to Twitter.

## Update your Header Photo and Profile Information

- 1 Look at the menu to the left of “Profile”.
- 2 Click the “Set Up Profile” button in the upper right corner.



- 3 Click to the camera to add a header photo. Use a photo that represents your firm, such as an image of your building or team.



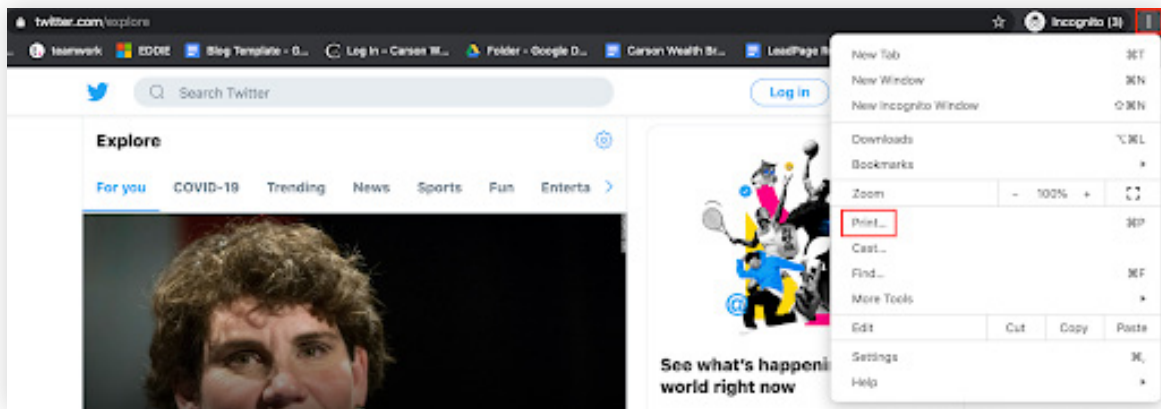
- 4 Make sure your Bio, Location and Website are updated. Your bio can be a brief description of your firm and/or mission statement. Bios are limited to 160 characters but please be sure to include the required compliance disclosure. Click here to learn more about social media disclosures and other compliance requirements.
- 5 Click to “See Profile” to exit out once done.

## Submit your Twitter Account to Compliance for Approval

If you need to send a PDF of your Twitter account to your compliance team or to your broker-dealer or an archiving service, you can do so by following these steps.

To generate a PDF of your Twitter account:

- 1 Navigate to your Twitter home page and click to “Print” from your browser. The location of the print option varies from browser to browser, this document displays the location in Chrome.



- 2 Choose the “Save as PDF” option and save the document to your local machine.
- 3 Submit the PDF to Compliance via the Advertising Submission Process.
- 4 Once approved you can make your Twitter account public and begin to send out tweets.
- 5 Submit your Twitter Account to Compliance for Approval

## Increase your Followers

Gain more followers and promote your practice with the following tips:

- » Actively post content to Twitter.
- » Incorporate relevant hashtags (#).
- » Follow contacts and industry-relevant accounts.
- » Engage in conversation.



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