



# **The Socially Savvy Advisor + Website: Compliant Social Media for the Financial Industry (Wiley Finance)**

*Jennifer Openshaw*

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**The social media marketing bible for the financial industry**

*The Socially Savvy Advisor: Compliant Social Media for the Financial Industry* is the complete guide to creating an effective social media strategy without breaking the big rules. Written by an industry specialist Jennifer Openshaw, alongside Stuart Fross, Fidelity International's former general counsel, and Amy McIlwain, president of Financial Social Media, this book merges marketing basics with FINRA and SEC guidelines to help readers create an effective social media campaign specifically for the finance and investing world. Contributions from industry leaders at Charles Schwab, Citibank, and others provide inside perspective and experience so readers can tap into a new audience. With a focus on compliance, the book clears common hurdles while dispelling myths and outlining effective methods and techniques. Readers also gain access to a website featuring videos, Q & As, tutorials, Slideshare, and a social media policy template.

Social media is one of the hottest topics in finance. From solo practitioners to large asset managers, everyone's consumed by how, when, and where to use this new and powerful medium—but guidance is hard to find. *The Socially Savvy Advisor* covers the entire issue, from platform, to content, to what *not* to do.

- Best practices in using social media for advisors and compliance officers
- Planning for the regulators, vs. failing to plan
- Challenges with LinkedIn, Facebook, Twitter and other social platforms
- Elements of a good social media policy
- Managing the top issues related to marketing and business development, engagement, and compliance

With the right plan and the proper technique, social media marketing can dramatically improve client outreach and retention. *The Socially Savvy Advisor* provides the expert insight, tools, and guidance that shape a robust, effective strategy.

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