FMG Suite:
Marketing Tools
Getting Started

LPL and FRG have engaged FMG to provide our financial professionals with access to their premier marketing automation system—an all-in-one, integrated suite of tools. This exclusive package is available on a subscription basis and includes:

- LPL Research campaigns, including the Weekly Market Commentary and more
- Automated birthday greetings, personalized digital and print greeting cards
- Preapproved content libraries from FMG and FRG Marketing
- Compliance review portal that routes automatically to the LPL Compliance Team

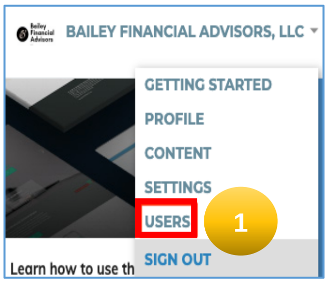
For help call **FMG Support Team at (858) 251-2420** or email **service@fmgsuite.com**.

Sign Up for FMG

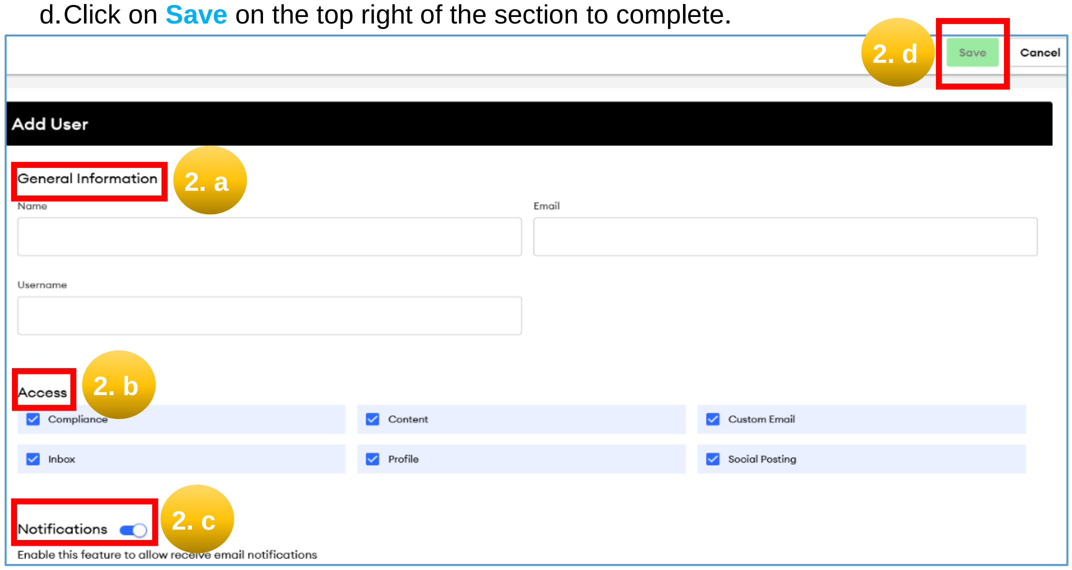
Click here to visit our Financial Resources Group (FRG) microsite to begin your enrollment. Sign in for the first time using the FMG invitation sent to your email after your enrollment is completed.

1. Click on the link in the email to open it in your browser.
2. Here, you will be prompted to set your username and password.

Adding a Sub-User (Delegate)

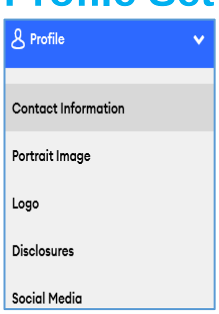


1. Click on your name on the top right, and select **Users** from the drop down menu.
2. Next, click on the **Add User** button under the **Active Users** banner, and:
   a. Fill in the Name, Email, and Username. Suggested format is "FirstNameLastName-LastNameofAdvisor" for more consistency.
   b. Leave all Access items checked off.
   c. Use toggle switch to enable or disable email notifications for the sub-user.
   d. Click on **Save** on the top right of the section to complete.



3. An email invitation is generated and sent to the sub-user's email address. The sub-user has to open the link in that email to create a password.

Profile Set-up and Email Design

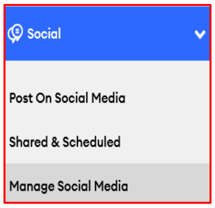


Click on **Profile** on the left of the page to expand the menu and complete each section. You can use the **Save Draft** button on the top right of each section to save your progress and return later to complete it. Click on the **Publish** button to submit each section to Compliance for approval.

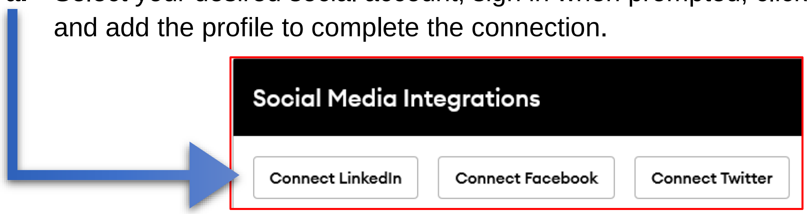
1. Contact Information – Personal info, Company info, Address, Email, Office Number, and Call to Action Links (create a button to "Schedule a Meeting" and insert the URL link to an online appointment scheduler)
2. Portrait Image – Upload professional headshot.
3. Logo – Upload the logo of your affiliated program.
4. Disclosure – Copy and paste the approved disclosure from your email signature

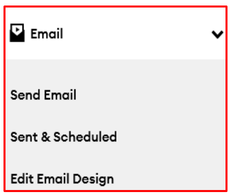
Skip steps 5 and 6 if you do not use social media.

5. Social Media – If you use LinkedIn, Facebook or Twitter, copy and paste the URL link from that social media profile and paste it in the designated box.
6. Connect Social Media Account – Click on **Social** on the left of the page to expand the menu and select **Manage Social Media**.

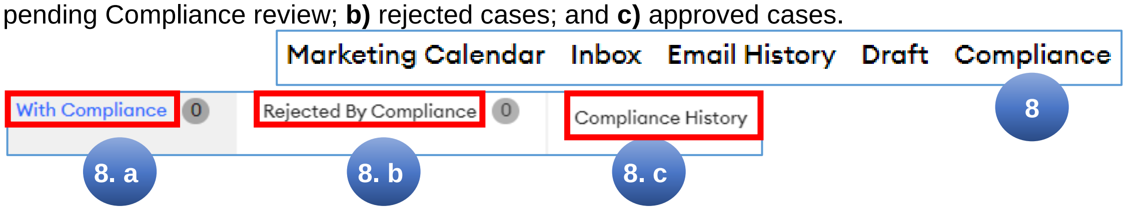


   a. Select your desired social account, sign in when prompted, click allow to give access and add the profile to complete the connection.

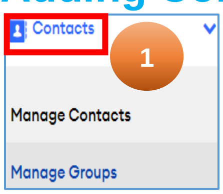




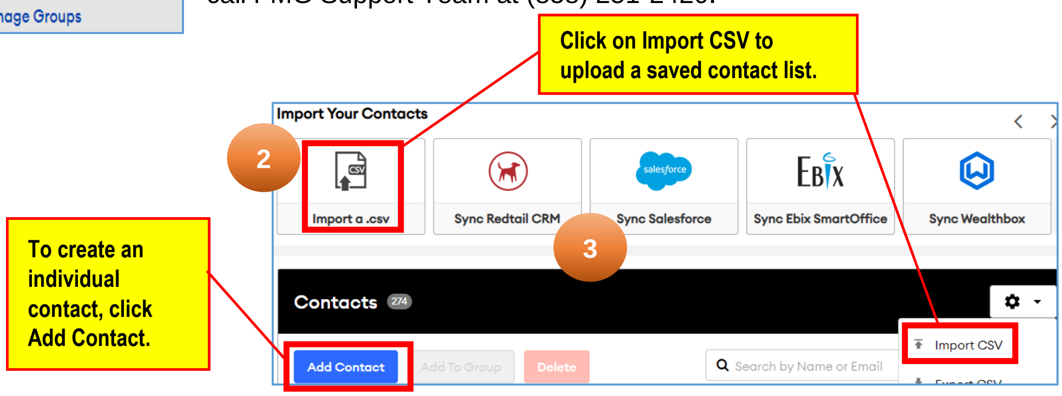
7. Email Design – Click on **Email** on the left of the page then select **Edit Email Design** to preview your email template generated from your Profile. If no further changes, click on **Publish** to submit to Compliance for review and approval.
8. Use the integrated Compliance tool on the top right of the homepage to track: **a)** open cases pending Compliance review; **b)** rejected cases; and **c)** approved cases.



Adding Contacts



1. Select the **Contacts** tab on the left of the page then click on **Manage Contacts** in the expanded menu.
2. Click on the "**Import a.csv**" tile to upload a saved list of your contacts. Contacts can be added individually by clicking on the **Add Contact** button. For assistance with uploading a contact list, call FMG Support Team at (858) 251-2420.



3. For Redtail CRM or Salesforce users, sync your contacts by clicking on the desired tile.

Launching a Campaign

1. Click on **Content Library** to browse all **Collections** of pre-approved email campaigns, social posts or greeting cards available to you. To use the Weekly Market Commentary, click on the LPL Email Campaigns collection then select the "**Use Email**" action on the right of the row, choose your audience and click **Save.**
2. Use the **Automated Marketing** tab to view popular campaigns, and quickly start or stop a campaign by clicking on the respective toggle switch.