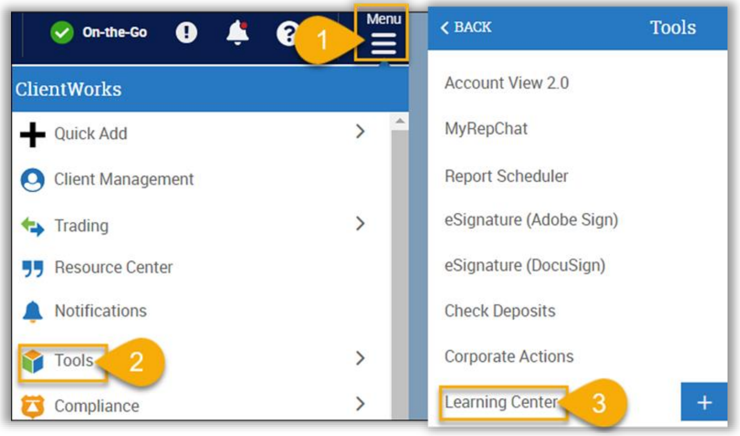
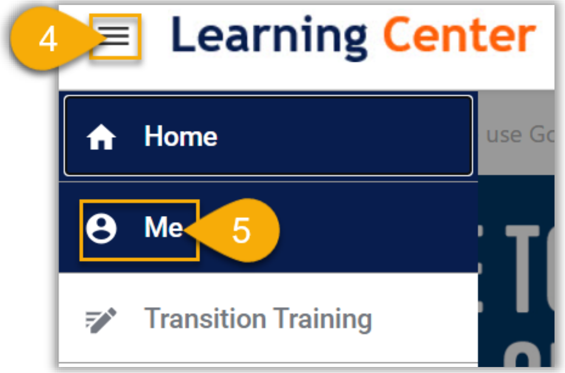
Social Patrol:
Social Media Onboarding Process

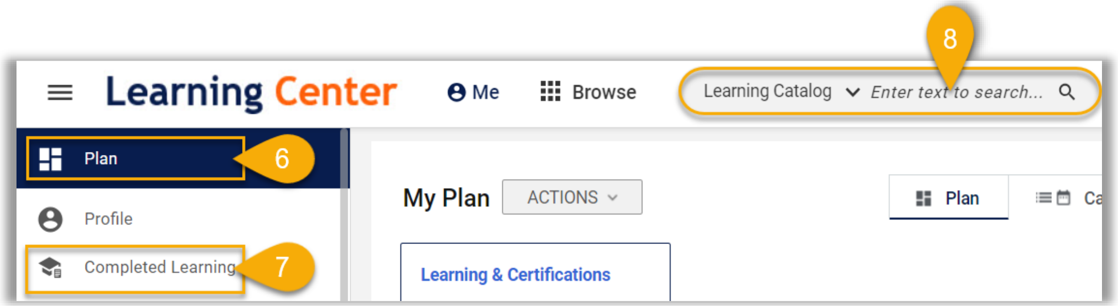
All LPL Financial and hybrid advisors and their staff must meet all LPL requirements, including registered and non-registered assistants, part-time staff, and interns who use social media for their securities or advisory business communications.

Did you complete the Social Media training course?

The completed Social Media course is a requirement for authorizing Social Patrol to monitor your social media accounts for business.







Check for Social Media training course completion:

1. Access the **Menu** in ClientWorks
2. Then choose **Tools** from the menu options
3. Click on **Learning Center**
4. On the top left corner, click on the **menu**
5. When the menu expands, select **Me**
6. Your **Plan** will display all in-progress training courses. Look for the ***Social Media*** training course and complete it, *if needed*.
7. If you completed the course already, you can verify by checking your **Completed Learning**
8. If the course is neither in your Plan nor Completed Learning, then use the **search bar** to find "Social Media" and complete it.

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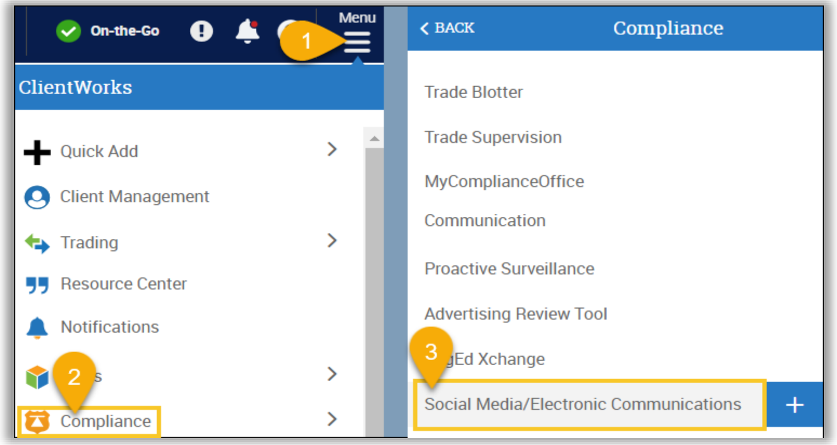
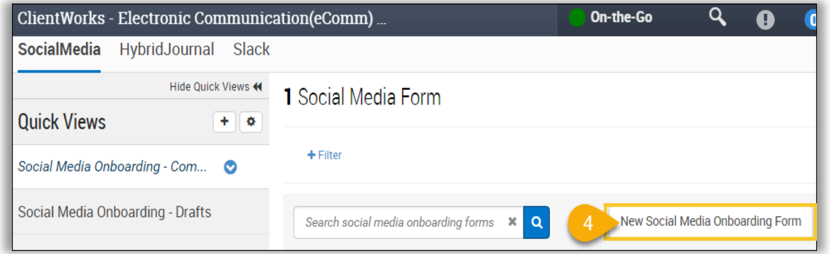
How to submit the Social Media Onboarding Form



1. Access the **Menu**
2. Then choose **Compliance**
3. Click on **Social Media / Electronic Communications**



4. On the right, click on **New Social Media Onboarding Form**

If the enrollee is a Registered Assistant or Non-licensed Associate, there is no cost and no intended payor box.

Social Patrol:

Social Media Onboarding Process

Install and Authorize Social Patrol on your Social Accounts

After you complete the Social Media training course and submit your Social Media Onboarding Form, the Social Patrol account is created and an email is sent from socialpatrol-noreply@lpl.com to you with the installation link.

https://suite.us2.nexgate.com/install_patrol/INSTALL-uDpSB9j31HFsFC6sAoNq

1. Click on Social Patrol link above to begin authorization process. Read the disclosures on the landing page then click **Continue**.

2. Enter your LPL.com email then click **Continue**.

3. When you select the **"Install on"** link for the desired platform, you are directed away from Social Patrol and asked to sign into that platform. Use your social media account credentials to log in. You will be asked to authorize the Social Patrol application; please provide all permissions that are requested. Repeat this step for every other social account, as needed.

4. Upon completion, you'll see a message thanking you for installing Patrol on that account. A link is available on the "thank you" screen to install Social Patrol on other social media accounts.

NEXT STEPS

Your assigned Marketing Regulatory Review analyst will review the social media account profile content to ensure it's consistent with applicable standards. You may need to add required disclosures and turn off unsupported functions and features. If changes are needed, your analyst will contact you.

When your profile content is approved, you'll receive a confirmation email from the sender **Proofpoint Social Patrol**; Email address: noreply@nexgate.com.

Please note: Unsupported content must be submitted for pre-approval using the standard procedure due to current technical limitations. For more information, please see the Social Media User Guide* on the Resource Center.

**Please sign into ClientWorks before clicking on Social Media User Guide*

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Apply these easy best practices to your profiles to instantly boost your Search Engine Optimization (SEO)!

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PowerUp LinkedIn Profile for Independents

PowerUp Facebook Business Profile for Institutions

PowerUp Facebook Business Profile for Independents

PowerUp Your Facebook Business Profile!

Apply these easy best practices to your profiles to instantly boost your Search Engine Optimization (SEO)!

Building Your Digital Footprint Step-By-Step Guide

Build upon your search engine optimization (SEO) and credibility with this step-by-step, interactive guide for websites, social media, Google Business and testimonials.

Step-By-Step Guide (Interactive)