

R I G H T

W R O N G

# Chapter Guide

Ethics and Social Media

Advocis 

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## Pricing (Members and Non-members)

1. Members: \$25 minimum (\$25 remitted back to National)
2. Non-Members: \$40 minimum (\$40 remitted back to National)

Chapters will be responsible for refunds related to seminar registrants.

## Revenue Sharing

1. Chapters are required to remit \$25 for members and \$40 for non-members for seminar attendees.
2. Full accounting and allocation must occur within 30 business days following the seminar.

*Important: If multiple chapters wish to hold the event together, revenue sharing will be left to the discretion of the chapters involved, as documented in a joint agreement. A joint agreement template can be found at: <http://www.advocis.ca/secure/chapters/pdf/program-guidelines-R.pdf>*

## Promoting the Program

The main vehicles for chapters to promote “Ethics and Social Media” will be email, “word-of-mouth” marketing, and the display and distribution of collateral materials.

The target audiences for this course are:

- CFP® and QAFP™ professionals;
- CLU® designated advisors and CLU® designation program candidates;
- CHS® designated health specialists; and,
- Experienced financial advisors, members or non-members of Advocis.

## Learning Objective

The objective of the Ethics and Social Media Program is to inspire Financial Advisors and Planners to participate in group discussions with solutions using case studies around ethics and social media.

## Participant Eligibility

Ethics and Social Media is for all Financial Advisors and Planners regardless of experience level.

## What Participants Need

Participants will need:

- Blank paper or notepad
- Advocis Code of Professional Conduct Explanatory Notes
- FP Canada Standards of Professional Responsibility

## Facilitator Resources

Upon submission of the online **Ethics and Social Media Facilitator Registration Form** available on Chapter Central, facilitator will receive access to the following resources:

Resource	Details	Format
Chapter Guide	The Chapter Guide outlines available facilitator resources and recommendations on how to run your CLU event.	PDF
Video	The video to play in the event.	MP4
Reference Documents	Advocis Code of Professional Conduct Explanatory Notes	PDF
	FP Canada Standards of Professional Responsibility	PDF

## Event Format

The following is how to run an Ethics and Social Media event.

### Suggestion on How to Run your Event

1. **For in-person events**, provide each participant with blank paper and a printed copy of the Advocis Code of Professional Code of Conduct Explanatory Notes and FP Canada Standards of Professional Responsibility for Participants.  
**For virtual events**, send the pdf copies of the Advocis Code of Professional Code of Conduct Explanatory Notes and FP Canada Standards of Professional Responsibility by email to participants.
2. Explain to participants that the video will introduce questions and case studies and the Facilitator can pause the video so that participants can write down their thoughts on paper, or discuss with other participants in breakout rooms or at their table.
3. When the Facilitator resumes the video, Rod Burylo will discuss answers to the questions and case studies.

## CE Accreditation

The Ethics and Social Media program has been approved for 2 CE credits (including Ethics and 1 Professional Responsibility credit with FP Canada).

## Questions

If you have questions, concerns, or comments regarding the facilitator resources, please contact Sue Bailey, Education Coordinator via email at [sbailey@advocis.ca](mailto:sbailey@advocis.ca).