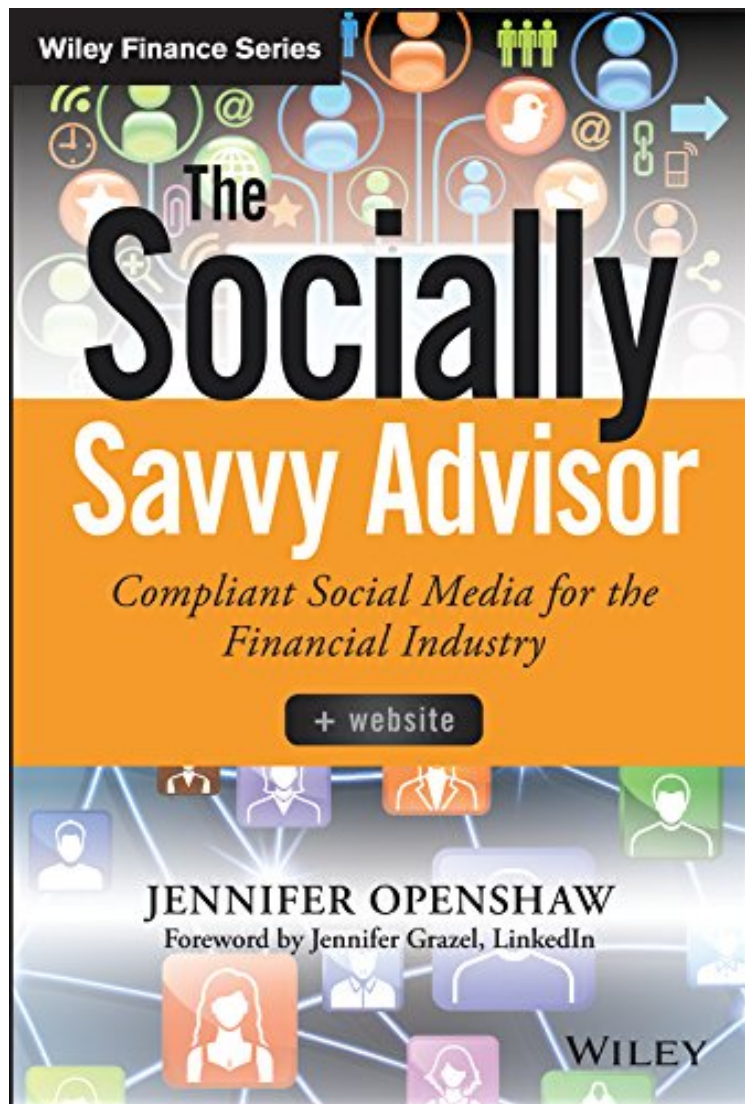


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The Socially Savvy Advisor + Website: Compliant Social Media for the Financial Industry (Wiley Finance)

Jennifer Openshaw

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Jennifer Openshaw : The Socially Savvy Advisor + Website: Compliant Social Media for the Financial Industry (Wiley Finance) before purchasing it in order to gauge whether or not it would be worth my time, and all praised The Socially Savvy Advisor + Website: Compliant Social Media for the Financial Industry (Wiley Finance):

0 of 1 people found the following review helpful. Four StarsBy G. Harrisgood, not great, information0 of 0 people found the following review helpful. I'm happy to have contributed to it as the marketing ...By Daniel SchreckJennifer has penned an informative book; I'm happy to have contributed to it as the marketing investor relations head of a long-

tenured hedge-fund firm. She brings an "insiders" experience and an "outsiders" freshness to the topic like few others could. In sum, the asset management industry (hedge funds in particular) should embrace new/developing technologies and tactics when they advance the common purpose of serving the client. Trust is the basis of all long-term relationships and in our industry it's no different. Therefore, we should be open to anything that builds trust with those we serve and seek to serve. That means having differentiated and tailored communication and being at the forefront as our industry changes in the years ahead (e.g., w/ social media, reporting, analysis, databases/platforms, websites, Jobs Act, branding, etc). These pages can serve as a good, general primer on where to start and where we're headed. 1 of 1 people found the following review helpful. Real world explanations and advice for how to be social in financial services By Blane Warren It was a treat to get to know Jennifer and contribute to this book. It is a topic I have been immersed in since 2007. Disclosed bias aside as a contributor - what Jennifer has done is assemble a much more "real world" cookbook rather than settling back on theories for the use of social media in financial services. Certainly being social in our industry was all academic early on - but the last four years have shown that it can be done compliantly, securely and thoughtfully with positive results. Working through this material allows a business or individual advisors to understand the landscape of social networks, possible obstacles and risks - and once a decision is made on proceeding - the help is also here to insure the reader has the recipes for getting engaged online.

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.

From the Inside Flap Social media platforms have transformed investor habits and expectations. Investors are researching opportunities online and sharing thoughts and exchanging ideas about financial products and services. Today's tech-wise investors expect their financial advisors to be similarly engaged. The Socially Savvy Advisor is the complete guide to creating an effective social media strategy without breaking the rules or causing conflicts with regulators. Written by industry leader Jennifer Openshaw, the text and companion website combine marketing basics with FINRA and SEC guidelines to give financial advisors and other professionals the confidence to create an effective social media campaign specifically designed for the finance and investing world. With a laser-like focus on compliance, the author addresses the top social media challenges, dispels common myths, and outlines the most effective methods and techniques. To help advisors keep current with the most popular social media trends, Openshaw shows how to work with the business-oriented network LinkedIn to leverage existing relationships. She also explains how Facebook offers advisors an opportunity to track important events that have financial implications in the lives of their clients. And Twitter gives advisors a quick way to reach and educate influencers and investors. Read this book and you'll have the tools to deal with emerging social platforms into the future. The Socially Savvy Advisor is filled with contributions from executives at industry leaders such as Charles Schwab, Citibank, and others to provide an insider's perspective. By tapping into these top performers' insights and experiences, advisors can learn to harness the power of social media to strengthen their client bases and increase their business prospects. To get the most from this resource, The Socially Savvy Advisor's website features videos, Q As, tutorials, regulatory guidelines, and a social media policy template. From the Back Cover From the Foreword "The Socially Savvy Advisor is a comprehensive guide to our social ecosystem and regulatory landscape. It provides pragmatic advice and how-to tips that can transform your social marketing efforts from being a tangential business strategy to a decisive game changer." —Jennifer Grazel, Global Head of Category Development, Financial Services, LinkedIn Praise for The Socially Savvy Advisor "From selecting the right social media platform for your business and creating a social media policy, to creating content and measuring ROI, The Socially Savvy Advisor is a helpful resource for anyone in financial

services." —Leslie Marshall, Director, Social Media, Morningstar Inc. "The best book on social media for any leader in the financial industry—from CEO and CCO to CMO and others—hands down." —Douglas G. Preston, SVP, Compliance Executive "Plenty of pundits have opinions about how to use social media these days, but it's rare to find an expert who can lay out the pros and cons of using LinkedIn, Twitter and Facebook in the financial industry. Jennifer Openshaw takes a step-by-step look at the benefits of online marketing for financial professionals, but she also digs into the risks and examines the challenges of managing social media compliantly in a fast-changing regulatory environment. A great read for advisors." —Joyce Hanson, Technology Reporter, InvestmentNews

About the Author JENNIFER OPENSHAW, a nationally known leader in wealth management and consumer advocacy, has observed first-hand how technology is rapidly changing the financial industry. She has advised Fortune 500 firms, including Microsoft, on technology, social media, and communications, and writes a column on consumer investing and tech tools for MarketWatch and the LinkedIn Influencer program. She was named among the 25 Rising Stars of the Internet for her work as founder and CEO of Women's Financial Network, a pioneer in serving women investors online, and later sold the business to Wall Street legend Muriel Siebert. Jennifer has held senior positions at Bank of America, Wilshire Associates, and BankOne, and has been an executive of several social networking platforms geared toward investors. She has appeared on Oprah, Dr. Phil, CNN, and Fox and speaks nationwide. She lives in Connecticut with her husband and two daughters. Contact the author at [LinkedIn/in/jenopenshaw](https://www.linkedin.com/in/jenopenshaw) or info@sociallysavvyadvisor.com. Written with: STUART FROSS, partner, Foley Lardner, former general counsel, Fidelity International. AMY MCILWAIN, president, Financial Social Media.