

SJP Partnership Social Media Checklist

Are you using social media in your marketing campaigns to help reinforce the key messages of any successful financial and wealth planning business?

- Financial education
- Investment responsibility
- Commitment to the community
- Life and news at your practice

You may be using one or a combination of social media channels:

- LinkedIn
- Facebook
- Instagram
- X (Twitter)
- YouTube

Do you have the right level of approval for your social media profiles?

Channel	Marketing Review	Financial Promotions Review	Approval Period	Attestation
Facebook	No	If promotional	One Year	Three months

Instagram	No	No	N/A	N/A
X (Twitter)	No	No	N/A	N/A
YouTube	No	If promotional	One Year	Three months

Information correct as at March 2023

Once approved you need to add the approval date onto your profile. **SJP Approved [dd/mm/yyyy]**

You need to add the Partner representative wording to any promotional post, as well as the Financial Promotions Approval wording

[Your practice name] is an Appointed Representative of and represents only St. James's Place Wealth Management plc (which is authorised and regulated by the Financial Conduct Authority).

SJP Approved [dd/mm/yyyy]

If you are unsure, you should seek clarification from your PDM.