
Estate Planning Council of Cleveland

Social Media Participation Guidelines & Recommendations

First and foremost, honor the licensing board of your degree, designation, or company affiliation.

Social media users must know and understand the limitations of their degree(s), designations(s) or company affiliations and participate based on those guidelines.

Please use the NAEPC-suggested language.

When noting your affiliation as an Accredited Estate Planner® designee, please refer to usage guidelines to ensure compliance, etc.

If it gives you pause, pause.

If you are about to publish something that makes you hesitate, don't hit "send". Take a step back and attempt to figure out what is bothering you. Resolve the internal conflict, and take appropriate action.

Speak from your discipline.

Be sure to offer comment based on your own professional discipline and write what you know. If you choose to write about a topic that you are familiar with, but the topic is not within your area of expertise, make this clear to your readers.

Be aware of liability, and always maintain confidentiality

Do not post confidential information about your clients, colleagues, council, or employer. Respect the privacy of offline conversations. Remember, you are responsible for what you post.

Call the council office if you ever have questions or are uncertain about how to handle a social media situation.

We're here to help! Please reach out to EPC Cleveland if you have concerns about your participation.

Consider privacy settings when setting up your personal or organization's social media profile. Consider how you balance your personal and professional profile online.

Users must find their own comfort level and stick with it. Social media users should fully understand the options available with regard to privacy settings, post appropriately for their comfort level, ensure the image you're offering is the image you want others to know you by, understand how to remove something you have posted, ask permission before posting someone else's information, and ensure that your equipment has adequate spyware and virus protection.

Always assume that you're speaking on behalf of your firm and/or EPC Cleveland. Watch what you say about other members.

Present yourself in the utmost professional manner.

Be sure that you make it very clear the views you express are your own.

Social Media Participation Guidelines & Recommendations continued...

Jargon, and when to use it.

Consider when to use professional jargon, depending on who your audience is and their general understanding of the content matter

Be courteous. Be professional. Be appropriate.

Perception is reality.

In online social networks, the lines between your public and private and personal and business lives are blurred. Be sure that the content you post is consistent with your work, values, and professional standards.

Correct your own mistakes.

If you make a mistake, admit it and be swift with your correction.

Don't just talk about yourself; ask questions, participate, and share information.

Talk to your readers as if you were involved in a professional setting. Make open-ended statements that solicit a response, encourage comments, and allow content to be shared. Be sure that comments you are sharing are adding value to the conversation.

Disclaim frequently.

Make it clear that the views you are expressing are yours alone and not necessarily the views of your affiliated local council.

Be transparent.

Your honesty, or lack of, will be quickly noticed in the social media environment. If you have a vested interest in something, be the first to point it out.

Think carefully about making endorsements.

If you choose to endorse a product, program, or other professional, do your homework and make sure that you are comfortable having this endorsement available for the world to see!

The Internet saves forever.

Information you post online is not easily removed. Make sure you think before you post and make sure you're posting information or pictures that you are comfortable sharing with the world. *After all, you can't put toothpaste back into the tube once it is out!*

Questions about social media participation should be directed to the council office at:

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Cleveland, OH 44114
(216) 696-1228
admin@epccleveland.org

*The Estate Planning Council of Cleveland would like to thank the
National Association of Estate Planners & Councils for providing these guidelines.*