Career Network Guide to Using Social Media

Background

The popularity of social media, such as Facebook, LinkedIn and Twitter, is growing steadily. For advisors, these online media are direct and effective ways of reaching their clients and promoting themselves.

Given the public nature of such platforms, they need to be used with care. These guidelines were created to support advisors who choose to use social media.

The goal of this guide is to raise awareness among advisors about certain challenges associated with the use of social media in the context of their activities and to ensure their rights and those of their clients and iA Financial Group are respected.

In order to dissociate their professional activities from their personal activities, advisors are recommended to create business pages which are separate from their personal pages. The business page would be public, open to everyone, and not exclusive to the advisor's "friends."

Advisor obligations

— Any communication through social media must be done in a professional manner, taking into account that all content published on social media may be consulted by any user who has access to the page.

— The use of social media must comply all applicable laws, regulations and legislation, particularly the *Code of Ethics of the Chambre de la sécurité financière*.

— Advisors must always adhere to the *iA Financial Group Market Conduct Standards Code.*

— Agents must read the Terms of Use pertaining to the social medium they wish to use and accept those terms.

— Advisors who use social media for professional reasons must ensure that this use does not in any way harm the image or reputation of iA Financial Group.

— Advisors must ensure they do not post any personal information about their clients or co-workers or any confidential information about iA Financial Group, including any information that is considered to be confidential or which should reasonably be considered as such due to its nature.

— Advisors may only advertise products and services that are offered by iA Financial Group and its subsidiaries, in compliance with their contract.

— Advisors must respect third-party intellectual ownership rights and obtain permission from the owner of the rights to use any image, photo, video, text or trademark, without failing to mention the name of the author or owner of such rights.

iA Financial Group

For exclusive use by advisors

— Advisors must pay attention to the quality of the language used on their page. The presence of spelling or grammatical mistakes may reduce the advisor's, as well as iA Financial Group's credibility.

— Advisors must not post defamatory, discriminatory, racist or sexist statements or hate speech on social media. In addition, they must not post political statements. Advisors must remove any posts of this nature, as needed.

Content of professional pages

— Advisors must display the title or titles they are authorized to use under the *Act Respecting The Distribution Of Financial Group Products And Services*. They must use their real names on the profile pages of their accounts, and indicate the name of the firm they represent: Industrial Alliance Insurance and Financial Services. The use of iA Financial Group's name without the name of the advisor is prohibited.

— Pages must include a professional photo of the advisor. Advisors are expressly forbidden from using logos belonging to iA Financial Group or its subsidiaries as profile photos.

— If an advisor wishes to present iA Financial Group's products and services on the page, they may use the official texts located on the general website at ia.ca.

— Advisors are authorized to include a short text describing iA Financial Group on their pages. This official text is the one used by the company in communication documents intended for the general public and may be obtained from Client Experience, Brand Management and Digital Strategy.

Any advisor who wishes to create a social media page must go through the following approval process:

1 The advisor completes the Social Media Approval Request form, which can be found in the Creating Facebook pages guide at ia.ca/webshowcase ;

2 The agency manager approves the form ;

3 The agency manager forwards the form to the regional vice-president for approval ;

4 The regional vice-president transfers the file to the Client Experience, Brand Management and Digital Strategy for final approval.

iA Financial Group reserves the right to ask advisors to remove any element from their page that may harm the image or reputation of iA Financial Group.

This guide may be changed at any time. A notice of any changes will be sent to all advisors.