



# SOCIAL NETWORKING & WEBSITE DISCLOSURE

**Social Networking Site(s):**

**New Disclosure**

**Update**

I maintain a profile ***Soliciting Business or Advertising Financial Services*** available through my affiliation with Private Client Services on the following social networking sites:

I don't maintain a profile ***Soliciting Business or Advertising Financial Services*** through my affiliation with Private Client Services.

Check all that apply:  LinkedIn  Twitter

Facebook URL: \_\_\_\_\_

Facebook account administrator IF other than the person for whom this form is being completed - Name and Email address are required: \_\_\_\_\_

Instagram URL: \_\_\_\_\_

Instagram account administrator IF other than the person for whom this form is being completed - Name and Email address are required: \_\_\_\_\_

YouTube URL: \_\_\_\_\_

Youtube account administrator IF other than the person for whom this form is being completed - Name and Email address are required: \_\_\_\_\_

➤ ***Social Networking sites other than LinkedIn and Twitter will incur additional fees for archive services. (Check with PCS Compliance for archive rates)***

➤ *Only Facebook Business Pages may be used (See PCS Social Networking Policy)*

➤ *Certain state privacy laws prevent PCS from monitoring social networking sites and therefore prevent compliance with FINRA supervision rules. Social networking in these states must be limited to personal use only. As of the revision date of this disclosure the applicable states are CA, DE, IL, and MD.*

**Website(s):**

**New Disclosure**

**Update**

I do not have an affiliation with, or own, any business-related websites.

I am affiliated with the following business-related websites:

URL: \_\_\_\_\_ Investment related?  Yes  No Website hosted by: \_\_\_\_\_

URL: \_\_\_\_\_ Investment related?  Yes  No Website hosted by: \_\_\_\_\_

**For any websites that are not hosted by Broadridge, Smarsh, AdvisorWebsites, 20 Over 10, Advisor Products or FMG Suite, (hosts with a compliance portal) please read and check the following:**

I agree to submit the applicable website for review via MarketingPro.com or remove any reference to investment products or services within 60 days. I acknowledge that non-compliance with this policy may result in disciplinary action.



**PRIVATE  
CLIENT  
SERVICES**<sup>TM</sup>  
MEMBER FINRA, SIPC  
A Registered Investment Advisor

## SOCIAL NETWORKING & WEBSITE DISCLOSURE

By signing below, you certify that you have read and understand the PCS Social Networking Policy, and you agree to comply with the Policy. You also agree to update your Social Networking and Website Disclosure Form when changes occur. If you reside in a restricted state, you acknowledge that any social networking will be limited to non-securities/advisory use.

<b>Representative Name:</b>	<b>Representative Signature:</b>	<b>Date:</b>
<b>Surveillance Officer Name:</b>	<b>Signature:</b>	<b>Date:</b>