

<b>Facebook Usage Reference Chart</b>	
<b>Profile Information</b>	<b>Review Policy</b>
<b>Initial Profile Setup:</b> Summary, Description, Job History, Specialties, Education, Interests, Honors and Awards, and must include the B/D disclosure if listing role as a Registered Representative (or any other approved title)	Pre-Approval must be obtained for all initial setup options for a new Facebook profile. Submit a pdf screen shot of the profile pages into <a href="#">Marketing.pro</a> for review and approval.
Investment related recommendations	Prohibited
Non-Investment related recommendations	Non-securities related recommendations are allowed and will be monitored via Erado Archive.
Endorsements	No endorsements may be made on a Facebook profile that includes any information related to the securities industry and/or the user is listed as a Registered Representative (or any other approved title)
Profile edits	Monitored via Erado Archive. No pre-approval is required.
<b>Posts Within Facebook</b>	<b>Review Policy</b>
New Network Update/Post	Monitored via Erado Archive. No pre-approval is required.
Replying to a Network Update/Post	Monitored via Erado Archive. No pre-approval is required.
Commenting on a Network Update/Post	Monitored via Erado Archive. No pre-approval is required.
Deletion of a Network Update or comment	Monitored via Erado Archive. No pre-approval is required.
“Liking” a Status Update/Post, Comments or Facebook Page	Prohibited for anyone or anything securities related. Exception for the user’s own DBA, PCS posts, or of an associated person of PCS.
Requesting/Inviting a Facebook “Friend” to “Like” your page	Non-securities related are monitored via Erado Archive. No pre-approval is required.
“Sharing” post or pages from your Business Facebook Page	
<b>Groups</b>	<b>Review policy</b>
Joining Groups	No Restrictions
Creating Groups	No Restrictions
Posting to Groups and/or Creating Group Discussions	Monitored via Erado Archive. No pre-approval is required.
<b>Connections and Messaging</b>	<b>Review Policy</b>
Inviting Connections	No Restrictions
Accepting Invitations	No Restrictions
Removing Connections	No Restrictions
Composing a Message / Asking a Question	Messages may be sent to 24 or less recipients without pre-approval. Securities related sent to 25 or more recipients must be pre-approved via <a href="#">Marketing.pro</a> .

Replying to a Message/ Answering a Question	Messages may be sent to 24 or less recipients without pre-approval. Securities related sent to 25 or more recipients must be pre-approved via <a href="#">Marketing.pro</a> .
<b>Miscellaneous</b>	<b>Review Policy</b>
Creating an Advertisement, New Page, Event	Pre-Approval must be obtained for all set-up options. Submit a pdf screen shot of the page into <a href="#">Marketing.pro</a> for review and approval
Creating a Fundraising Event	Fundraising from clients or potential clients is generally prohibited
Installing Applications	Securities related applications must be pre-reviewed and approved by Compliance prior to installation.
Searches	No Restrictions
End of Facebook	

<b>Instagram Usage Reference Chart</b>	
<b>Profile Information</b>	<b>Review Policy</b>
<b>Initial Profile Setup:</b> Summary, Description, Job History, Specialties, Education, Interests, Honors and Awards, and must include the B/D disclosure if listing role as a Registered Representative (or any other approved title)	Pre-Approval must be obtained for all initial setup options for a new Instagram profile. Submit a pdf screen shot of the profile pages into <a href="#">Marketing.pro</a> for review and approval.
Investment related recommendations	Prohibited
Non-Investment related recommendations	Non-securities related recommendations are allowed and will be monitored via MirrorWeb Archive.
Endorsements	No endorsements may be made on a Instagram profile that includes any information related to the securities industry and/or the user is listed as a Registered Representative (or any other approved title)
Profile edits	Monitored via MirrorWeb Archive. No pre-approval is required.
<b>Posts Within Instagram</b>	<b>Review Policy</b>
New Network Update/Post	Monitored via MirrorWeb Archive. No pre-approval is required.
Replying to a Network Update/Post	Monitored via MirrorWeb Archive. No pre-approval is required.
Commenting on a Network Update/Post	Monitored via MirrorWeb Archive. No pre-approval is required.
Deletion of a Network Update or comment	Monitored via MirrorWeb Archive. No pre-approval is required.
“Liking” a Status Update/Post or Comments	Prohibited for anyone or anything securities related. Exception for the user’s own DBA, PCS posts, or of an associated person of PCS.  Non-securities related are monitored via MirrorWeb Archive. No pre-approval is required.
<b>Groups</b>	<b>Review policy</b>

Joining Groups	No Restrictions
Creating Groups	No Restrictions
Posting to Groups and/or Creating Group Discussions	Monitored via MirrorWeb Archive. No pre-approval is required.
<b>Connections and Messaging</b>	<b>Review Policy</b>
Inviting Connections	No Restrictions
Accepting Invitations	No Restrictions
Removing Connections	No Restrictions
Composing a Message / Asking a Question	<b>Prohibited.</b> Instagram doesn't allow any current archiving service to capture private/direct messages between followers.
Replying to a Message/Answering a Question	<b>Prohibited.</b> Instagram doesn't allow any current archiving service to capture private/direct messages between followers.
<b>Miscellaneous</b>	<b>Review Policy</b>
Installing Applications	Securities related applications must be pre-reviewed and approved by Compliance prior to installation.
Searches	No Restrictions
End of Instagram	

<b>YouTube Usage Reference Chart</b>	
<b>Profile Information</b>	<b>Review Policy</b>
<b>Initial Profile Setup: If applicable</b> Summary, Description, Job History, Specialties, Education, Interests, Honors and Awards, and must include the B/D disclosure if listing role as a Registered Representative (or any other approved title)	Pre-Approval must be obtained for all initial setup options for a new YouTube profile. Submit a pdf screen shot of the profile pages into <a href="#">Marketing.pro</a> for review and approval.
Investment related recommendations	Prohibited
Non-Investment related recommendations	Non-securities related recommendations are allowed and will be monitored via MirrorWeb Archive.
Endorsements	No endorsements may be made on a YouTube profile that includes any information related to the securities industry and/or the user is listed as a Registered Representative (or any other approved title)
Profile edits	Monitored via MirrorWeb Archive. No pre-approval is required.
<b>Videos Within YouTube</b>	<b>Review Policy</b>
New or Updated Video	Pre-approval required via Marketing Pro
Live Streams	Pre-approval required via Marketing Pro. The script and any material to be presented must be included
Moving or Transferring your Channel	Prohibited
Replying to a comment	Monitored via MirrorWeb Archive. No pre-approval is required.
Commenting on a video	Monitored via MirrorWeb Archive. No pre-approval is required.
Deletion of a comment	Monitored via MirrorWeb Archive. No pre-approval is required.

“Liking” a comment or video	Prohibited for anyone or anything securities related. Exception for the user’s own DBA, PCS posts, or of an associated person of PCS.  Non-securities related are monitored via MirrorWeb Archive. No pre-approval is required.
<b>Communities</b>	<b>Review policy</b>
Joining Groups	No Restrictions
Creating Groups	No Restrictions
Posting to Groups and/or Creating Group Discussions	Monitored via MirrorWeb Archive. No pre-approval is required.
<b>Connections and Messaging</b>	<b>Review Policy</b>
Inviting Subscribers	No Restrictions
Accepting Subscribers	No Restrictions
Removing Subscribers	No Restrictions
Composing a Message / Asking a Question	Messages may be sent to 24 or less recipients without pre-approval. 25 or more recipients must be pre-approved via <a href="#">Marketing.pro</a> .
Replying to a Message/ Answering a Question	Messages may be sent to 24 or less recipients without pre-approval. 25 or more recipients must be pre-approved via <a href="#">Marketing.pro</a> .
<b>Miscellaneous</b>	<b>Review Policy</b>
Installing Applications	Securities related applications must be pre-reviewed and approved by Compliance prior to installation.
Searches	No Restrictions
End of YouTube	

<b>LinkedIn Usage Reference Chart</b>	
<b>Profile Information</b>	<b>Review Policy</b>
<b>Initial Profile Setup:</b> Summary, Description, Job History, Specialties, Education, Interests, Honors and Awards, and must include the B/D disclosure if listing role as a Registered Representative (or any other approved title)	Pre-Approval must be obtained for all initial setup options for a new LinkedIn profile. Submit a pdf screen shot of the profile pages into <a href="#">Marketing.pro</a> for review and approval.
Recommendations	Any investment related recommendation is prohibited from being made on LinkedIn.
Recommendations	Non-securities related recommendations are allowed and will be monitored via Global Relay Archive.
Endorsements	No endorsements may be made on a LinkedIn profile that includes any information related to the securities industry and/or the user is listed as a Registered Representative (or any other approved title)
Profile edits	Monitored via Global Relay Archive. No pre-approval is required.
<b>Posts Within LinkedIn</b>	<b>Review Policy</b>

New Network Update/Post	Monitored via Global Relay Archive. No pre-approval is required.
Replying to a Network Update/Post	Monitored via Global Relay Archive. No pre-approval is required.
Commenting on a Network Update/Post	Monitored via Global Relay Archive. No pre-approval is required.
Deletion of a Network Update or comment	Monitored via Global Relay Archive. No pre-approval is required.
“Liking” a Status Update/Post or Comments	Prohibited for anyone or anything securities related. Exception for the user’s own DBA, PCS posts, or of an associated person of PCS.  Non-securities related are monitored via Global Relay Archive. No pre-approval is required.
<b>Groups</b>	<b>Review policy</b>
Joining Groups	No Restrictions
Creating Groups	No Restrictions
Posting to Groups and/or Creating Group Discussions	Monitored via Global Relay Archive. No pre-approval is required.
<b>Connections and Messaging</b>	<b>Review Policy</b>
Inviting Connections	No Restrictions
Accepting Invitations	No Restrictions
Removing Connections	No Restrictions
Composing a Message / Asking a Question	Messages may be sent to 24 or less recipients without pre-approval. 25 or more recipients must be pre-approved via <a href="#">Marketing.pro</a> .
Replying to a Message/ Answering a Question	Messages may be sent to 24 or less recipients without pre-approval. 25 or more recipients must be pre-approved via <a href="#">Marketing.pro</a> .
<b>Miscellaneous</b>	<b>Review Policy</b>
Installing Applications	Securities related applications must be pre-reviewed and approved by Compliance prior to installation.
Searches	No Restrictions
End of LinkedIn	

<b>Twitter Usage Reference Chart</b>	
Personal Tweets	All tweets are archived and reviewed, therefore personal “tweets” are considered a waste of firm resources and should be avoided when using business related twitter accounts.
Attachments on Twitter Profile	The only approved attachment to a twitter profile is a pre-approved photo of the representative user of the profile. Initial Twitter profiles should be submitted for pre-approval through <a href="#">Marketing.pro</a> .
Hyperlinks	No hyperlink may be included in a “tweet” that directs a recipient to a file located on a site or location other than a PCS approved site or location.

For more detailed information related to the PCS policies related to social media use, please review the PCS Social Networking and Website Policy located under Compliance Forms in the PCS Advisor Resource Center of the PCS Website ([www.pcsbd.net](http://www.pcsbd.net))