



FRANKLIN TEMPLETON  
INVESTMENTS

FRANKLIN TEMPLETON ACADEMY

# THE SOCIAL SAVVY ADVISOR

If you still struggle to figure out how to leverage social media in a way that makes sense for your business and clients, or if you're just not sure how to begin, this course will help start you on a productive path to a social strategy that suits your style and fits into your schedule.

## Course Summary

Using social media productively and compliantly, and in a way that suits individual personalities and business goals, can be a challenge. To help you build a strong strategy, this course explores different social media:

- Storytelling techniques
- Client acquisition, management, and engagement approaches
- Compliance risks
- Channel-by-channel planning techniques



## Learning Objectives

This course is designed to teach you to be able to:

- Use social media effectively to tell an impactful story to clients and prospects.
- Develop social media strategies that can lead to referrals, deepen understanding of prospects and clients, and establish subject matter expertise.
- Recognize what legally compliant content and actions are available on social media.
- Analyze both worthwhile and ineffective uses of social media for understanding client concerns, demonstrating trustworthiness, and building a positive digital impression.
- Select an effective action plan for social outreach that suits individual circumstances.

## Accreditation

This course has been accredited for **1.0 CPD hours** by the Financial Planning Association of Australia.

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