

Media Participation Agreement

- 1) The media has a choice as to who they call upon for information and expertise on personal finance issues. I must be prepared to respond promptly, give information that I know to be accurate, to the best of my ability, and to be unbiased, objective and without a personal agenda.
- 2) When FPA refers the media to me, I am representing FPA, not just my practice. That does not mean I must compromise my opinions or practices, but I should consider that the articles are designed for a broad audience and that my advice should fall within the accepted parameters and guidelines of the financial planning process. The purpose of participating is *NOT* to directly promote my practice or any product. It is to provide information that would be considered appropriate and accurate for a wide audience.
- 3) The media appreciate being able to gain access to many CERTIFIED FINANCIAL PLANNER™ professionals through one organization. After they have experience with a particular planner, they may begin to call that planner directly as a resource. I should NOT contact the media representing myself as calling on behalf of, or through, FPA of _____ Pittsburgh, PA _____. If I have an opinion, an idea, or a grievance, then I should act on my own behalf and not as a member of FPA of _____ Pittsburgh, PA _____. As a practitioner, I may write my own letters to the editor or contact the media on behalf of my own company, but NOT under the auspices of FPA of _____ Pittsburgh, PA _____.
- 4) When participating in a newspaper column or an article in which I am providing advice to a reader (i.e. Money Makeover, etc.), the reader is entitled to a limited amount of free unbiased advice as a benefit of participating in the article. I am obligated to provide this advice. I am not required to go beyond a reasonable amount of service. It is imperative NOT to sell anything to the reader until the article is complete. If the reader should later decide to become a client of my firm, that is fine. Publications have expressed concern when a specific product had been sold or strongly recommended to the reader during the time the article was being prepared. My role is to provide general guidance, not promote or sell products, during that time.
- 5) For the purposes of articles that are handled through FPA of _____ Pittsburgh, PA _____, I will give a balanced view of any product or advice I recommend. The media is very suspicious when a planner “over promotes” a product, particularly when they know there is a commission involved.
- 6) Newspapers, radio and TV all work under tight deadlines. FPA generally can give its members only a few days or less of lead-time in working on the article. It is imperative when I agree to participate, that I work on the assignment promptly and act professionally and graciously. I understand that I must respect reporters’ deadlines or they will move on to the next source and FPA will lose an opportunity to promote the financial planning profession.
- 7) I must keep in mind that I am not purchasing advertising space for which I have total control. Nothing I say is “off the record.” I understand that there is no guarantee that the reporter will contact me when I volunteer to be a source for a story.

- 8) If I don't know the answer, I will find it for the reporter or pass the question on to someone who can meet the reporter's needs.
- 9) Generally, I am not writing the article. I am a resource. I will likely be asked to provide information to the reporter over the phone, or I may be able to jot down some notes, a graph, etc. to send via fax or e-mail.
- 10) If I am not familiar with the writer, their articles or the publication, I will become familiar. I can ask the reporter for a previous article and keep up with the columns in my local publications.
- 11) I will keep investment recommendations within the generally accepted parameters. I understand that if I am affiliated with a broker-dealer, it is my responsibility to find out if I need approval to participate with the media beforehand.
- 12) I understand that, in accordance with FPA's bylaws, I must be a CFP® professional, a chapter president or chapter PR director in order to respond to consumer media requests. I can respond to trade media requests regardless of my CFP status.

Media Participation Agreement with FPA of Pittsburgh, PA.

I have read the information regarding working with the media through FPA of Pittsburgh, PA. I agree to abide by the guidelines and standards set forth and to uphold FPA's code of ethics.

Signature

Date

Print Name

Member Number

Company Name

Phone Number

Fax Number

E-mail Address

Are you affiliated with a broker-dealer? _____

If so, who? _____

Specialties _____

Do you have a professional photograph? _____