

Appendix N

SOCIAL MEDIA POLICY

The Boston Estate Planning Council (“BEPC” or “Council”) recognizes that the Internet, electronic communications, and Social Media are important communication and information delivery methods, engagement tools, and relationship building mechanisms used by our Members. This Social Media Policy (“SMP”) is designed to guide and foster responsible, constructive, and effective communication by and between Members when using Social Media to participate in BEPC, such participation to include but not be limited to, BEPC sanctioned Events and BEPC governed, moderated or disseminated channels as more fully described below.

Capitalized terms used but not defined herein shall have the meaning ascribed to them by the Boston Estate Planning Council Code of Conduct Policy dated May 10, 2019, as such Code of Conduct Policy may be permissibly amended from time to time (“CCP”).

DEFINING SOCIAL MEDIA:

For the purposes of this SMP, “Social Media” is broadly defined to include electronic or Internet-based methods or means of communication by and between Members that is governed, moderated, or disseminated by the Council. By way of illustration and not one of limitation, examples of BEPC governed or moderated channels include:

- The BEPC website (including any forums it may contain)
- Recognized Social Media platforms (e.g. LinkedIn, Twitter, Instagram, etc.) or other online communities that host communications governed, moderated, or disseminated by BEPC

Electronic communications not governed by the SMP include newsletters and emails developed and disseminated by the Council.

ADMINISTERING SOCIAL MEDIA:

The primary overseer of all BEPC Social Media efforts will be the Council’s Marketing and Communications Committee, with management and administration assistance from the Council’s management company.

Responsibility for administering, delivering, and managing Social Media content will be determined by the type of channel being employed. For example:

- The BEPC website will be managed by the Council’s management company, with support and oversight from the Marketing and Communications Committee.
- All BEPC posts on any recognized Social Media platform (e.g. LinkedIn, Twitter, Instagram, etc.) or other online communities will be monitored by the Marketing and Communications Committee, with support from the Council’s management company.
- Membership approvals will be necessary for Social Media that includes a collaborative group functionality where the group is closed or limited to Members, such as a LinkedIn

group. The Council's management company will be responsible for verifying Members pursuant to the SMP's Terms and Conditions, as more fully described below.

The administration and management of Social Media includes monthly tasks such as developing publishing calendars, monitoring comments, and taking advantage of engagement opportunities with Members, including responding to questions and comments from Members as necessary.

SOCIAL MEDIA CONTENT:

Content, including but not limited to BEPC sourced content and third-party content, should be designed to create engagement and collaboration among the Members and drive thought leadership for the Council. Consistency of messaging is important to the Council and all content moderated or disseminated on BEPC channels will be monitored by the Council's management company with assistance from the Council's public relations firm (if needed) and oversight from the Council's officers, directors, and the Marketing and Communications Committee.

Social Media content, wherever and however posted, must also conform to the SMP's Terms and Conditions as more fully described below.

Content will originate from a variety of sources, including the officers, directors, committees, management company, public relations firm, sponsors, events, and Members. The ability to post content will depend upon the type of Social Media platform being used and will ultimately be decided by the Marketing and Communications Committee in collaboration with the Council's leadership. By way of illustration and not one of limitation:

- Content for the BEPC website will further depend on where on the website the content is being displayed. For example, the management company will source and post content for any official communications sanctioned by the Council, but any open forums, comment sections, or discussion groups will be open to the membership and may contain content posted directly by BEPC officers, directors, committees, Members, or the public at large.
- Content for any other Social Media platform (e.g. LinkedIn, Twitter, Instagram, etc.) will come from BEPC officers, directors, committees, Members, the public relations firm, or the management company, depending on the channel and type of communication involved. For example, the management company will source and post content for any official communications sanctioned by the Council (e.g. posts by the BEPC LinkedIn account), but any comments to posts or open forums may contain content posted directly by Members, or the public.

TERMS AND CONDITIONS:

All Social Media content, including content governed, moderated, or disseminated by BEPC as well as all content generated or posted by Members, must comply with the following Terms and Conditions:

- In situations where content is restricted to Members, only Members who have been verified by the Council will be allowed to 'join' or 'belong to' a group or online community and post or comment.
- Social Media governed or moderated by the Council must contain a disclaimer indicating that any content posted by Members and not disseminated by the Council or its management company is the opinion and responsibility of the Member authoring the post or comment and not that of the Council.
- Members must comply with both this SMP as well as the BEPC CCP when using Social Media governed or moderated by the Council. Conduct violative of the BEPC CCP (See BEPC CCP Section E, Prohibited Conduct) through Social Media channels shall be per se violate of this SMP. Violations of this SMP shall be reported and addressed by the Council in the same manner as violations of the BEPC CCP.
- The content must be BEPC-related or, if informational or educational in nature, must be related to one or more of the professions in which Members are engaged.

SOCIAL MEDIA CONTENT EXAMPLES:

- The following is for illustrative purposes only and serves as an example of the types of content that could be encouraged for sharing on Social Media:
 - Event announcements/info/highlights (including posting while at events)
 - Topical news of interest to BEPC members
 - Informational or educational articles related to BEPC or BEPC Members' professions
 - Educational opportunities provided by BEPC
 - Council announcements
 - Member highlights
 - New Member bios
 - Charitable partner highlights
 - Content from seminars and programs
 - Member firm job postings
 - Sponsor highlights
- The following is for illustrative purposes only and serves as an example of the types of content that are prohibited from sharing on Social Media:
 - Material that is protected by copyright or trademark, unless the express, written permission of the copyright or trademark holder has been obtained.
 - Political opinions
 - Personal and professional attacks
 - Prohibited conduct as set forth in Section E of the BEPC CCP
 - Solicitation or advertising (i.e. promoting of the Member's firm or firm event), unless expressly authorized by the Council
 - Legal opinions (as opposed to information), unless the Council decides otherwise on a circumstantial basis
 - Items not related to BEPC or the professions in which BEPC Members are engaged, unless the Council decides otherwise on a circumstantial basis

Members who violate the SMP Terms and Conditions risk Discipline as set forth in Section G of the BEPC CCP, such Discipline to be determined as provided in Section H of the BEPC CCP.

Any violation of this SMP should be reported to the Council in the same manner for reporting violations of the CCP as provided in Section F of the CCP, or by email to bepc@bepc.org or by calling 978-364-5170.

It is the Board of Director's responsibility to review and approve this policy once a year, so it accurately reflects the organization's current use of these channels.

POLICY ADOPTION HISTORY:

- Originally Adopted:
 - Date: March 27, 2020
 - Adopting Body: BEPC Board of Directors