

MEMBERSHIP & PARTICIPATION

What types of activities can I expect to participate in?

There are a variety of activities for you to participate in such as discussion boards, idea exchanges, contests, surveys, quick polls, and live chats. The content will change frequently, so we encourage you to log in regularly.

How else can I participate in the Connecting Advisors community?

There are many ways to participate in Connecting Advisors. Depending on the current activities, you could make a post, reply to other members' posts and comments, Like another members post, submit an entry to a contest, vote on contest entries, participate in a chat, stay updated with the blog, take quick polls, or participate in surveys.

How often am I expected to log in?

You will be contacted about twice a month by email to participate in new activities. You can also log in and check your available activities on the home page. It is always your choice whether you participate, but the more you do, the greater the chance to win rewards. If you do not log in for thirty (30) days, you will receive an email reminder to visit the Connecting Advisors community. After another 30 days goes by with no login, you will receive another email alerting you that your account may be deactivated, and your reserved spot in the Connecting Advisor community may be passed to another prospective member.

How is my personal privacy protected?

Information such as name, birth date, and income are factors we use to better understand your interests and profile. Without them, we are not able to have statistically accurate results for studies and other research. Protecting your privacy is very important to us. Login to view our complete Privacy Policy.

How do I cancel my membership in Connecting Advisors?

You can cancel your membership at any time by clicking the unsubscribe link at the bottom of any Connecting Advisors email. Or, you may follow the steps below:

1. Click My Settings in the upper right corner
2. Click the Preferences Tab
3. In the Preference Options section, click End Membership

You may also send us an email at support@connectingadvisors.com with the words "Cancel Membership" in the subject line. We would also appreciate it if you could please let us know the reason(s) for cancelling your membership.

ACCOUNT SETTINGS

How do I get to my profile page?

Clicking on your login name will take you to your profile page. After you log in, your login name will be displayed at the top right hand corner of every page in the Connecting Advisors community.

How do I edit my profile page (e.g. location, bio, etc)?

Your profile page is a place for you to tell other members about yourself. To edit your profile:

1. Click My Settings in the upper right corner
2. On the Personal Profile tab, click the Profile Information link
3. Fill in any field you like and then click Save

Community members can always see your bio on your profile page. You can control who sees your name, location, personal webpage address, and email. The default setting is "No one" but this can be changed to "All" or "Friends Only". To change this setting:

1. Click the Preferences tab and click Privacy
2. There are three different settings you can adjust:
 - Show private information in profile (your name, location, and personal webpage address)
 - Show email address
 - Show online status
3. Click Save Changes

How do I change my password?

For privacy reasons we do not have access to your password. To change your password:

1. Click My Settings in the upper right corner
2. Click the Personal Profile tab and click on the Password section
3. Enter your new password and click Change My Password

How do I change my email address?

You can change the email associated with your Connecting Advisors community membership anytime.

1. Click My Settings in the upper right corner
2. Click on the Personal Profile tab and go to the Email section
3. Enter your new email
4. Click Change My Email Address
5. You will receive a verification email at that new address. Just follow the instructions in that email and you're set!

How do I change the avatar (image) next to my name?

A personal photo is a great way to customize your profile. You automatically get an avatar when you join Connecting Advisors, but you can change it anytime and as often as you like. Your current avatar always appears at the top of the Avatar page. To change your avatar:

- Click My Settings in the upper right corner
- Click the Avatars tab
- To use a pre-loaded avatar from the collection, select Choose a Collection from the drop down and click an avatar to use it
- To use an image from your Image Gallery, click From Uploaded Images and select the image you want. You will only see this option when you have uploaded images.

- To use an image from the web, click From the Web and enter the URL for the image. Click Set Avatar.

How do I upload an image/photo to my Image Gallery?

1. Click on your user name to go to your profile page
2. Click on Upload an Image in the Images section. If you have previously uploaded an image, select View Images to add more
3. Browse for your image file and then click Upload
4. Select an album for the image: private (for your eyes only), or public. Additional albums can also be created for organizing your uploaded images

Please note that uploaded images are subject to the Connecting Advisors Terms and Conditions. Images containing inappropriate content or copyrighted material will be removed by the Connecting Advisors Community Moderator. Continued violation of the Terms and Conditions can result in the user being banned from the community.

How do I create a signature for my posts?

1. Click on My Settings in the upper right corner
2. On the Personal Profile tab, click on Profile Information
3. Fill in the text you want for your signature in the Signature field
4. Click Save

POSTING MESSAGES

How do I reply to a discussion?

Use the Reply button to write a response to a discussion topic or a particular member post:

1. When you reply to a post, the subject line will be filled in for you automatically. You can change it if you want
2. A reply to the discussion topic will appear at the end, in the order received. A reply to a particular member will appear under the original post, in the order received
3. Type your comment in the Post Message area
4. When you're ready, click Post

How do I post a comment on a blog or idea exchange?

Posting a comment is a lot like posting a reply. If commenting is enabled, you'll see a Post a Comment area at the bottom of the page.

To post your comment:

1. Type your comment in the Post a Comment area
2. When you're ready, click Post Your Comment

How do I delete a reply or comment?

Please contact the moderator support@connectingadvisors.com and let them know which post you want to delete and the reason why.

How do I post an idea in a suggestion box or idea exchange?

Posting an idea is a lot like posting a reply. To post your idea:

1. Click the New Idea
2. Type a Subject and the Body of your idea

- 3.To receive email when someone comments on your idea, click the E-mail me check box
- 4.If labels are required, enter or choose one or more labels. Labels categorize ideas into topics
- 5.When you're ready, click Post

How do I submit an entry in a contest?

Submitting an entry is a lot like posting a reply. Depending on the contest, you can add links, images, or videos. You can also preview your entry and check your spelling before posting. To post your entry:

- 1.Click New Entry
- 2.Type an Entry Subject and the body of your entry
- 3.When you're ready, click Post

How do I vote for a contest entry, idea or comment I like?

You vote by clicking Like. Just click the Like button next to the entry, idea or comment.

How do I insert an image in a post?

You can insert images anywhere: in messages, replies, blog articles, ideas, or comments. The maximum file size for images is 1000 KB.

To insert an image in a post:

- 1.Start a new post
- 2.Click the Insert Image button in the editor's tool bar (it looks like a tree)
- 3.Choose one of the sources listed below

To insert an image located on your computer:

- 1.Click Browse to select a file
- 2.Click Hide in Gallery (Private) to keep the image private on your profile page
- 3.Choose an image size
- 4.Choose how you want the image aligned
- 5.Click Insert Image

To insert an image from your image gallery:

- 1.Click the From My Uploaded Images tab
- 2.Click the image
- 3.Choose an image size
- 4.Choose how you want the image aligned
- 5.Click Insert Image

To insert an image from another Website:

- 1.Click From another Site, below the Browse button
- 2.Type the URL for the image and click Load Image
- 3.Choose an image size
- 4.Choose how you want the image aligned
- 5.Click Insert Image

How do I insert a video in a post?

You can insert videos anywhere: in messages, replies, blog articles, ideas, or comments. The maximum file size for videos is 500 MB or 512,000 KB To insert a video in a post:

- 1.Start a new post
- 2.Click the Insert Video button in the editor's toolbar (it looks like a strip of film)
- 3.Choose one of the sources listed below

To insert a video located on your computer:

- 1.Click the From My Computer tab
- 2.Click Browse to select a file
- 3.Click Hide in Gallery (Private) to keep the video private on your profile page
- 4.Click Upload
- 5.Choose a video size
- 6.Choose how you want the video aligned
- 7.Click Insert Video

To insert a video from your video gallery:

- 1.Click the From My Videos tab
- 2.Click the video
- 3.Choose a video size
- 4.Choose how you want the video aligned
- 5.Click Insert Video

To insert a video from YouTube:

- 1.Click the From YouTube tab
- 2.Enter the URL for the YouTube video
- 3.Click Preview
- 4.Choose a video size
- 5.Choose how you want the video aligned
- 6.Click Insert Video

REWARDS AND RECOGNITION

What kind of rewards could I get for participating in Connecting Advisors?

Surveys will furnish winners with a \$10 gift card of their choice (from a list of set merchants, restaurants, retailers, or vendors). Any other activity that offers a chance to win a prize will always include Official Rules. The complete Official Contest Rules and Regulations can be viewed by logging in.

How will I be notified if I win?

We send a winner notification email to the address we have on file for you. Every winner's notification includes an expiration date - which means that you must respond to the prize notification by the date stated in the email or you will forfeit the prize. Winners will also receive a notification email after their reward has been mailed.

Could you please explain to me how the ranking system works?

Rank is determined by a combination of several factors related to your membership tenure and active participation (e.g. posts and Likes). Your rank appears on your

profile page and under your user name whenever you make a post. As you move up the ranks, your rank color will change and you'll start earning badges.

What does it mean to "Like" something?

Clicking 'Like' is an easy way to recognize a post that you enjoy, or agree with, giving it a virtual "thumbs up". You may only Like a post once.

How do I Like something?

You can Like any post, idea, and contest entry in the community except your own. To Like a post and its author, click the Like button for that post.

How do I find out how many Likes I've given and received?

The number of Likes you've given and received (in total and by post) can be found on your profile page. To access your profile page, simply click on your login name in the upper right-hand corner of the screen.

TECHNICAL REQUIREMENTS

What should I do if a link from my email invitation, doesn't work?

If clicking on the link does not let you access the activity, copy and paste the link into your browser. The link may be cut across two lines or more. If it is, you may have to copy and paste each line separately. If you still cannot access the activity, please contact us.

What should I do if I'm having trouble/technical difficulties?

If you experience any type of technical difficulty, please contact us at support@connectingadvisors.com. Please include as much information as possible. We will look into the matter and get back to you within 2 business days.

What computer settings are required to participate?

We recommend the following settings on your computer:

1. Have cookies enabled on your computer
2. Have Java Script enabled

Additionally, we strongly recommend you use an updated browser. Our recommendations are to use one of the following:

1. IE 8 or later
2. Firefox 23 or later
3. Chrome 29 or later
4. Safari 5.1 or later
5. iPad Safari

If you don't run an updated browser, you may not be able to utilize some of our standard functionality.