

Agency/Agent Guidance for Using Video/Podcast/Recording For Your Business

Life & Annuity Compliance - Advertising Guidance Team (AGT)

Before recording any material that will be used for your business, please follow the guidance below to ensure a smooth process.

Where will the material be used?

Ensure the location the material will be posted to is a compliance approved location/platform/site etc. If you are unsure, please contact the AGT before committing to any agreements.

Posting on social media?

Videos **cannot** be posted directly to social media pages through Hearsay. Videos must be posted to YouTube, then a post can be created and submitted for review in Hearsay. If you do not have a compliance approved YouTube Channel, please complete the YouTube Submission Form found on the Agent Portal under Training>>Compliance>>NLG Life & Annuity Compliance>>Advertising/Social Media and submit to adreview@nationallife.com for review and written approval prior to use

Before creating a video/podcast/recording, the script or a very detailed outline needs to be submitted to the AGT for review and prior written approval.

The AGT needs to review and approve the script and/or a very detailed outline (i.e., questions and answers provided beforehand) and any items that will appear in the video or other recording prior to use. If you are using a PowerPoint presentation, it will need to be submitted. Anything the viewer will see/hear needs to be submitted. Adding graphs? Charts? Pictures? Links? Statistics? We need to see it. Sound effects in your recording? Yep, we need to know about it.

Once your material is submitted to the AGT, the following will happen:

- Your reviewer will review the material and provide edits, comments, disclosures etc. that are needed to you.
- Once the material is in good order, the reviewer will ask you to record your material. Your material is not approved for use at this time.
- You submit your recorded material to your reviewer for final review and approval prior to use. Please note that this can be problematic depending on the size of the file for final review. Be aware however that the recording needs to be in a format that can be downloaded such as an .mp3 or .mp4 file. We are required to maintain access to the recording indefinitely and cannot accept links as a final recording, unless the link provides a method of downloading the file. It should never be posted online prior to written approval unless instructed to by your reviewer.
- Your reviewer will conduct a final review and if it is in good order, they will provide approval, otherwise edits may be requested.
- Once approved, videos, podcasts or other recordings can be posted to your compliance approved website.
- If posting to YouTube, it is your responsibility to ensure the material is posted with comments disabled.
- If you are posting to another platform, it must be approved by your reviewer prior to posting.

Posting your approved recording to social media:

Your approved video can be posted to social media by the following:

- Post to YouTube (comments disabled).

- Create a post in Hearsay linking to your video.
- Submit your post for review in Hearsay.
- If your post is in good order, it will be approved in Hearsay.
- Your post will then be viewable on social media.