



Guide for North American Customers & Affiliates

Last revised August 15, 2016

Guide contents

Social, Supported by North American

Gainfully Cheat Sheet

Setting Up Your Account

Compliance

Social, Supported by North American

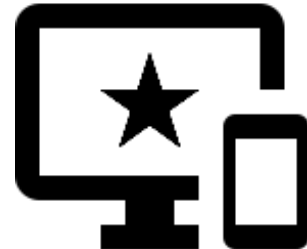
North American is working with Gainfully to support social sales for its affiliates – all 100% free. With Gainfully, you now have immediate:

- Access to compliance-enabled content and content campaigns
- Instant social media sharing and sharing automation
- Automatically generated lead-generating landing pages, branded for you

Recorded webinar

In addition to this guide, Gainfully hosts weekly webinars to welcome new users. In addition to the resources here, we invite you to watch and share the webinar!

Visit <http://blog.gainful.ly/social-sales-agents-north-american/>



Gainfully Cheat Sheet

Signup / Log In Page

The signup page can be used by affiliates and customers to sign up and gain automatic access to content

Visit <https://gainful.ly/signup/north-american/395/>



North American Content

The content and campaigns provided by North American are always available at this link.

Visit <https://gainful.ly/dashboard/#/North-American/organization/395/feed>



Resources, FAQs, Webinars

Expert resources are waiting for you in the resource center, including webinar recordings, FAQs and more.

Visit <http://help.gainful.ly>



Support

If you have trouble with your account there there's a team ready to help you out!

Email team@gainful.ly or contact your North American representative for content-related questions and issues



Setting Up Your Account

Your free, personal account will let you connect and share to your social media profiles and connect to North American and other professionals on Gainfully. You'll need a web browser on a desktop, laptop, or tablet computer and your LinkedIn account log in information.

Step 1: Create your account

Visit <https://gainful.ly/signup/north-american/395/>

Go to the signup link in your browser and click the Log In with LinkedIn button. If LinkedIn prompts you to sign in, use your personal LinkedIn username and password. You will then confirm your basic profile information and create a Gainfully password.

Step 2: Confirm compliance profile

Once inside Gainfully, go to [your account profile](#) and confirm any FINRA or SEC registration affiliations. This will apply any additional compliance policies to your account needed to use Gainfully safely.

Step 3: Build your library

Visit <https://gainful.ly/dashboard/#/North-American/organization/395/feed>

Go to the North American page to discover content and campaigns you can add to your personal library. From [your profile page](#) you can choose times to have your library content shared automatically, everyday.

Step 4: Set-and-forget your sharing

Once your library has some content cards in it, you can optionally turn on Autossharing. Autossharing enables you to have content automatically selected and shared from your library multiple times per day. We highly recommend it (you'll see what we mean)!

Compliance

Tip: Consult your compliance officer if in doubt about any setting or content item

The North American compliance policy governs which social media or other publishing profiles North American affiliates can utilize in Gainfully. For outside customers, their policy will be based on their own affiliation with supervising organizations, such as a broker-dealer.