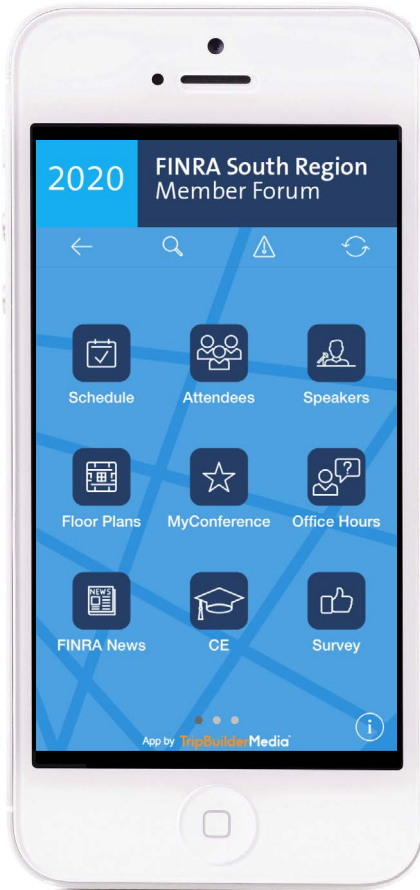


## App Tip Sheet | FINRA South Region Member Forum

Registered attendees are granted access to the forum app. All materials—including session presentations, handouts and the forum schedule—are available through it. Within the app, you can navigate the forum venue, complete the survey and network with other forum attendees.



### App | Log in:

1. Go to the App store on your mobile device (Google Play Store/iTunes App Store).
2. Search for “FINRA’s Events” and then download the app.
3. When the download is complete, open the app.
4. Enter your user ID (the email address you used to register for the Forum) and password (finra1939). If you have previously logged into the app and changed your password, the same password will apply.
5. Click on the “Events” icon and then select “South Region Member Forum.”



**Schedule:** See the full Forum schedule and browse sessions. Select a specific session to access the session description, speaker information and associated materials; ask session-specific questions; participate in polling; and take notes.

- **Polling:** To participate in polling, under the “Schedule” icon, select the session name, and then tap the “Polling” button.
- **Session Materials:** To email yourself handouts for a session tap the “handout” icon on the session details screen (icon only appears if a session has a handout). To export the handouts, tap the “Export” button and enter your email address.
- **Session Questions:** To ask a question through the app, select the session name under the “Schedule” icon and tap on the “Ask” button. This will then prompt you to submit your question via email.



**MyForum:** Mark sessions, attendees, exhibitors, etc., as favorites by tapping the “○” (iPhone) or “□” (Android) icon next to each name. From MyConference, you can view your personalized schedule, contacts and your notes.

- **Emailing Options:** You can email information to yourself—like notes and contact info—through the app from MyConference. Tap the “Export” button in the upper right corner, then select the items to export, next tap “Send,” and then enter your email address.

**HELP:** For assistance with the app, visit the App/CE desk at the forum.



**Attendees:** Search for a specific person or sort the entire attendee list by name or company. Email other attendees using the “Let’s Meet” or “Email” icons on the attendee’s details page.



**Speakers:** See a list of the Forum speakers. Search for a speaker or tap the speaker’s name to see his or her bio, photo and all of the sessions where the speaker is presenting.



**MyProfile:** Enter your contact information through the “MyProfile” icon by tapping on the edit button in the upper right corner. You can choose the information you wish to make public to attendees or keep private and save.



**Floor Plans:** The “Floor Plans” section provides a hotel floor plan for the space—use this to easily find the locations of sessions and the exhibitors you want to visit.



**Survey:** Submit feedback on the overall experience via the “Survey” icon on the app home page. Please note: Once you start the survey, if you navigate away from the page, your answers will not be saved.



**CE:** Learn about continuing education credits offered at the South Region Member Forum.



**FAQs:** Review answers to the most frequently asked questions.



**FINRA News:** Easily find FINRA news, reports and updates by tapping the FINRA News icon.

# Welcome to the 2020 FINRA South Region Member Forum App

We hope you enjoy using our FINRA  
South Region Member Forum app to  
help you get the most out of our  
event. Take a quick look at these  
helpful tips.



**SKIP**

**NEXT**



## Personalize It

Mark sessions, attendees, exhibitors, etc., as a favorite by tapping the "O" icon (iPhone) or "□" (Android) next to their name. From MyConference, you can view your personalized schedule, contacts, exhibitors and your notes.



PREV

SKIP

NEXT



## Note It

Take notes on sessions, speakers, exhibitors, etc. Export your notes and lists by selecting "MyConference," tapping "Export" in the upper right, selecting the items to export, tapping "Send," and entering your email.



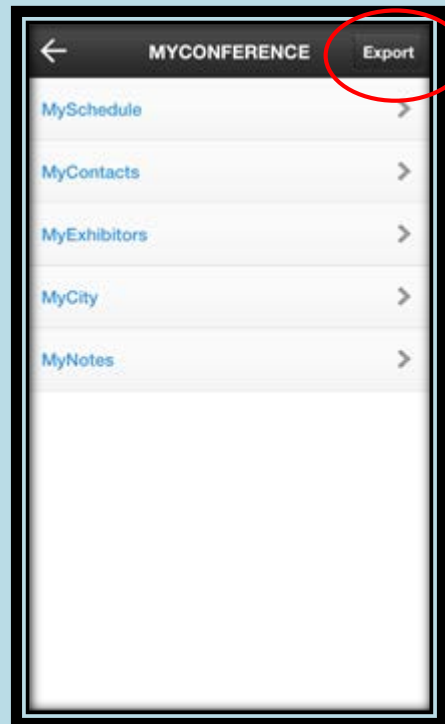
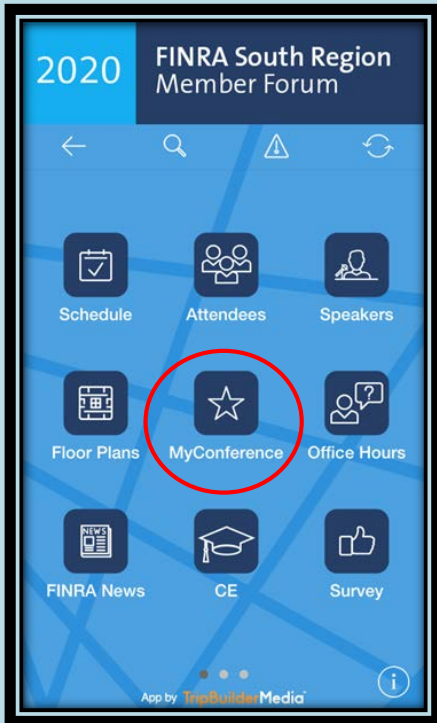
**PREV**

**SKIP**

**NEXT**

# Example

## 2. Tap Export



## 1. Select MyConference

# Example Continued

## 4. Enter email

**MYCONFERENCE**

Please select the personal list(s) you would like to export via email

- ☒ MySchedule
- ☐ MyContacts
- ☐ MyCity
- ☒ MyNotes

**Cancel** **Send**

**Cancel** **MyConference** **Send**


To:

Cc/Bcc, From:

Subject: MyConference

Attached is a csv file containing the MyConference selections you have shared from your TripBuilder Media Mobile App. If you have any questions regarding the attached file or would like more information about TripBuilder Media Mobile apps, please contact us at support@tripbuildermedia.com.

Thanks,  
The TripBuilder Media Mobile Team

  
MyConference.csv

## 3. Select items & Tap send



## Map It

Easily find sessions and exhibitors  
by tapping the "Map It" icon located  
next to their names.



PREV

SKIP

NEXT



## Export It

To view handouts for a session, tap the "Handout" icon on the session detail screen (icon only appears if there is a handout). To export handouts, tap the "Export" icon on the handouts listing page.



PREV

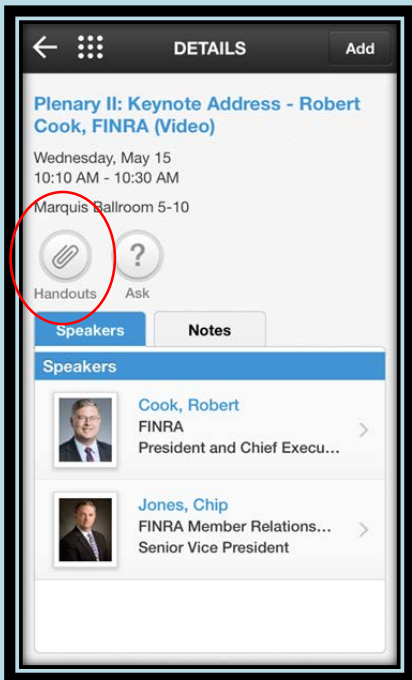
SKIP

NEXT



# Example

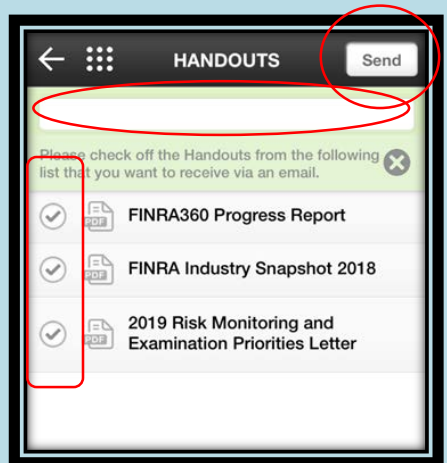
## 1. Select Handouts



## 2. Tap Export



## 3. Select items, enter email & Tap send





## Rate It

Share your feedback with us by completing our in-app survey. To access, tap the "Survey" icon on the home screen. Please note: Once you start the survey, if you navigate away from the page, your answers will not be saved.



PREV

SKIP

NEXT



## Ask It

Ask session-specific questions by going to "Schedule," > session name and tapping the "Ask" button at the top of the session details page.



PREV

SKIP

NEXT



## Schedule It

Schedule a meeting with FINRA staff to discuss questions and concerns. Select the Office Hours icon, tap the "O" icon (iPhone) or "□" (Android) next to appointment to book.



PREV

SKIP

NEXT



## Get Continuing Education Credits for It

The forum is eligible for CFP and  
CRCP CE credits and eligible for a  
CLE voucher. Tap the CE Icon for  
more information.



PREV

SKIP

NEXT



## Poll It

Some sessions will have polling. To participate, go to Schedule > Session title and tap on the "Polling" icon at the top of the session details page (icon only appears if there is polling).



PREV

SKIP

NEXT



## FINRA News

Easily find FINRA news, reports and updates by tapping on the "FINRA News" icon.



PREV

SKIP

NEXT



## Sync It

When there's new info, you'll know.  
Simply tap the "Sync" icon located  
on the upper right of your home  
screen when you see the red "Sync"  
badge appear.



PREV

SKIP

DONE



# Example

