**Bank*Safe* Financial Advisor Course Launch**

**Media Protocols**

***Please refer to this document for information on standard protocols for managing potential media inquiries, as well as guidance relating to the allocation of roles and responsibilities for the BankSafe financial advisor course launch.***

**NATIONAL PARTNER MEDIA LEAD:** To streamline communications, AARP asks that your organization (“National Partner”) designate one internal media lead who will serve as the liaison between AARP and National Partner for all media inquiries. Please provide this person’s name, email address, and office and mobile phone numbers to AARP’s national director of Bank*Safe* by August 1, 2020.

AARP will lead all media outreach, including press release distribution, proactive pitching and interview management. However, as National Partner leadership is quoted in the Bank*Safe* press release, you may receive inquiries/requests from the media related to the financial advisor course launch of Bank*Safe*.

Beyond gathering basic information when contacted by media as described below, National Partner staff members are not authorized to approach or speak to the media about Bank*Safe* without the written approval of Jilenne Gunther, AARP’s national director of Bank*Safe*. This includes responding to inquiries/requests from media resulting from National Partner’s quotation in the BankSafe press release, as well as discussions described as “background” or “off the record.”

All media inquiries should be immediately directed to Andy Mountain, GBSM. He will serve as the liaison between AARP, National Partner and the media and is authorized to act as a spokesperson for Bank*Safe*. Mountain can be reached at (303) 807-7831 or [andymountain@gbsm.com](mailto:andymountain@gbsm.com).

Please provide the following information (as much as is known based on initial inquiry):

* **Outlet name**
* **Reporter name**
* **Reporter contact information**
* **Summary of inquiry/request**
* ***If available*: reporter’s deadline and any written communication received from reporter**

This information will help AARP assess the inquiry and determine the most appropriate response, action(s) and/or spokesperson(s). Once AARP Media Relations has determined AARP’s course of action, they may request coordination from National Partner’s designated media lead (i.e. interview scheduling of National Partner leadership), if relevant to the specific media inquiry.