

THE GEN-SAVVY FINANCIAL PROFESSIONAL

For decades, financial services professionals have focused on demographic groups that are now largely in retirement. The financial services industry grew up with the Matures and the Baby Boomers. Now, new generations with different economic and cultural experiences, as well as different attitudes and expectations, are in the age ranges that make them prime markets for investments, retirement planning, insurance, and other financial products.

CAM MARSTON GENERATIONAL EXPERT

25+ years of research into how generational change reshapes today's workplace, marketplace, and retirement transition.

Connecting and building trust with each of these generations? It's a puzzle and it shouldn't be so hard.

Cam Marston can help. He understands the generations of both today and tomorrow and what they expect from financial services providers. He'll guide you on:

- Each generation's preferred communication preferences
- How each generation values different types of information
- What each generation's definition of “expert” is and how they apply it to financial professionals
- How to offer guidance to younger clients versus older clients to make them want to act
- Which sales tools to use, and how to use them effectively

These differences aren't exclusive to providing financial services. Cam studies these differences in the workplace, too, and shares best practices on building culture, leading, managing, recruiting and retaining, and running hybrid workplaces in a generationally diverse workforce. Cam Marston delivers content full of fresh insights and relatable stories about generational characteristics in the workplace and marketplace. People laugh. They remain engaged. They leave with practical solutions to better relate and get stuff done.

For more information contact

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