

Generational Insights at FAIRPORT NIGHT



HEATHER ETINGER - Managing Partner

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I go to conferences all the time and have heard others speak on similar topics. Cam marries statistics with anecdotes and a strong sense of humor to deliver his message in way that sticks with you. Never before has the presentation at this event carried over into conversations in this way. Everyone had somethingspecific they could start doing the very next day to improve their communication across generations.

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ABOUT THE CLIENT

Fairport Asset Management provides wealth management services to high net worth individuals, families and select institutions and has specialized services for succession and liquidity planning for business owners, executives, and financial issues and education unique to women. The firm’s professional staff includes CPAs, CFP certificants and CFA charter holders.

BUSINESS NEED

Every year Fairport Asset Management hosts “Fairport Night” - an evening of networking and appreciation for all of the firm’s advisory clients. The event begins with a keynote presentation designed to provide insights that can help Fairport’s clients manage important areas such as business, finances or family. In 2013, the Fairport team chose to build the keynote around the results of a recent client survey that showed clients’ primary concern was generational planning. A member of the Fairport staff had previously seen Cam Marston speak about the four generations at work and thought he would be a perfect fit for this client-facing event. The result was Generational Insights at Fairport Night, where Cam shed light on the differences of the generations, with a goal of making it easier for families to talk about financial planning.

INSIGHT AND IMPACT

Fairport invited clients to bring their adult family members to the evening so that everyone could hear the message. To underscore the importance of sharing the conversation and to encourage broad attendance, Cam filmed a short introductory video (<http://youtu.be/TRB4sulGHuw>) that was sent to all invitees. The video helped clients and their families appreciate the value of Cam’s message as it relates to understanding generational issues within the family and also in the workplace. Nearly 200 guests attended Fairport Night, with representation from all generations. In fact, as guests arrived they were asked to identify which generation they belonged to and nearly 10% were Millennials – a first for this client event. After a brief welcome, Cam shared his insights about how and why each generation is different, as well as some tips about how to best communicate with each. Throughout the presentation, the Fairport team witnessed families sitting together, laughing and nodding in recognition. But that was only the tip of the iceberg. During the cocktail reception following Cam’s presentation, the conversations continued. Guests had the opportunity to self-identify their generation via their name badges, which created camaraderie and ease of networking that was unique to the event. According to the manager responsible for the event, Cam has set the bar for creating a memorable, entertaining event where everyone learns something they can apply to their personal or professional life right away.