

THE GEN-SAVVY FINANCIAL ADVISOR

THE WAY FORWARD



Cam Marston, acclaimed author, columnist, lecturer, and radio/podcast host is a leading expert on workplace and marketplace trends.

For decades, financial services professionals have focused on demographic groups that are now moving into and past retirement. The Matures (born 1945 and prior) and the Baby Boomers (born 1946 – 1964) are the generations that the financial services industry grew up with and their client relationships were defined by traditional business models. Now, new generations, Generation X and, especially, Millennials, who have different economic and cultural experiences are moving into age ranges that make them prime markets for investments, retirement planning, insurance, and other financial products.

The next generation of financial services client has arrived. They will not tolerate being treated the same way their parents were treated. Learn what they want in this exciting and impactful presentation.

You'll learn:

- The attitudes and expectations of the upcoming generations and what they expect from financial services providers
- 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 the Covid Economy altered the way some generations perceive money and financial planning
- What the younger generations want financial professionals to teach them
- Each generation's preferred communication preferences
- Which sales tools to use, and how to use them effectively



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