



CHRIS WRIGHT
Director of Education and Events
Investments and Wealth Institute

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Looking at feedback, Cam’s content definitely resonated with people and provided practical knowledge to bring back to their firms. Cam took it to another level.

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ABOUT THE CLIENT

Investments and Wealth Institute (IWI) is a professional association, advanced education provider, and standards body for financial advisors, investment consultants, and wealth managers who embrace excellence and ethics. Certifications include CIMA®, CPWA®, and RMA®. The Institute offers high level education and the practical skills advisors need to successfully assist their clients.

BUSINESS NEED

IWI’s Annual Conference Experience (ACE) is a highly regarded conference for advanced financial advisors. ACE averages 1400-1600 attendees and provides an opportunity to earn 20 Continuing Education credits, half the required CEs for certification renewal. When considering ACE speakers, IWI looks for professionals offering academic knowledge as well as applicable skills for advisors to take back to their firms.

Impressed with Cam’s extensive expertise on generational trends, IWI asked him to conduct two breakout sessions on “The Gen-Savvy Financial Advisor” at their 2015 Conference. The session was such a success, they invited him to keynote and lead a breakout at the 2019 conference.

INSIGHT AND IMPACT

For the 2019 ACE, Cam provided a three-pronged service: he wrote an article for their bimonthly educational publication, *Investments & Wealth Monitor*, he delivered an engaging one-hour general session presentation on “Leading Multi-Generational Teams,” and he conducted a deep dive Q&A as a breakout session.

Chris Wright, Director of Education and Events, reported Cam’s services were very well received. He appreciated how Cam’s presentation used research and data to not only thoroughly explain each generation, but also offered specific tips on how to manage each generation effectively. Wright commented that Cam dismissed generational stereotypes and “took it to another level.” In fact, Investments & Wealth Institute staff are now implementing a staff retention model Cam provided as an example in his presentation. Of the 8 breakout sessions offered at ACE, Cam’s was the highest attended. The Q & A was so robust, there were two microphone runners and the session ended only because they ran out of time. Survey results were extremely positive, and Cam’s sessions were rated in the top 5% of all presenters.