THE GEN-SAVVY FINANCIAL ADVISOR®

PACKAGE DESCRIPTIONS

AUDIT PACKAGE: $300

3 MONTHS ACCESS TO:

- Downloadable Generational Preferences Quick Reference Guide
- Membership into The Gen-Savvy Financial Advisor® closed FaceBook page for term of membership

VIDEOS & LEARNING TOOLS:

Course 1: Introduction – What to expect and how to maximize your time in this course

Course 2: Optimizing the Client Base You Already Understand Best

The Matures:

1. The Matures: Meet Ozzie and Harriet
2. Understanding the Mature Generation Woman
3. Mature Women and Money
4. Engaging Matures from the Get-Go
5. Selling to the Mature Generation

The Baby Boomers:

1. Boomers: The Original "Me Generation"
2. Boomers: One Generation, Two Different Animals
3. Understanding the Boomer Woman
4. Boomer Women and Money
5. Engaging Boomers from the Get-Go
6. Selling to Boomers
7. Holding Boomer-Focused Client Events

Course 3: Capturing the Emerging Wealth of Gen Xers

Generation X:

1. Gen Xers: Skeptics and Cynics
2. Gen X: Your Online First Impression
3. Understanding Gen X Women
4. Gen X Women and Money
5. The Gen X Stalker Client Part One
6. The Gen X Stalker Client Part Two
7. Engaging Gen Xers from the Get-Go
8. Selling to Gen X
9. Holding Client Events for Gen Xers

Course 4: Building Trust Now with Your Clients' Heirs

The Millennials:

1. Millennials: Entitled and Coveted
2. Millennials: Adultolescents
3. Understanding the Millennial Woman
4. Millennial Women and Money
5. The Millennial Meeting
6. Engaging Millennials from the Get-Go
7. Selling to Millennials
8. Closing the Deal with a Millennial
9. Holding Client Events for Millennials

Millennials and Financial Literacy:

1. A Failing Grade
2. Short-Term Thinkers
3. Optimists

PRACTITIONER PACKAGE: $400

EVERYTHING IN AUDIT PACKAGE PLUS: An additional 3 months access for a total of 6 months.

AND

VIDEOS & LEARNING TOOLS:

Winning the Wealth Transfer

Meeting your Client's Next Generation: Boomer's Children

1. Boomer Children: Advocates and Future Clients
2. Boomer Children: Sending the Email
3. Boomer Children: Follow Up
4. Boomer Children: The Meeting and Possible Rejection

The Great Wealth Transfer: Boomers to their Kids

1. The Great Wealth Transfer; Part 1
2. The Great Wealth Transfer; Part 2

Gaining the Giants' Trust: Building Rapport with Ultra High Net Worth Clients

1. Ultra High Net Worth Individuals By Generation
2. The Ultra High Net Individual: An Introduction

Office Environment & Communication Differences

1. Curb Appeal in the Workplace?
2. Communication Styles and Regional Differences

A Peek into the Future – the iGen (born since 1980)

1. Understanding iGen
2. The iGen World in 2025

Downloadable & printable transcripts of each video.

6 months enrollment into The Gen-Savvy Financial Advisor® online coaching community.

Monthly conference calls / webinars to reveal new best practices and key client trends

DEEP DIVE PACKAGE: $550

EVERYTHING IN PRACTITONER PACKAGE PLUS: A total of one year's access to all features.

AND

VIDEOS & LEARNING TOOLS:

Topgrading Your Team: How to Attract and Activate Powerhouse Advisors

1. Recruiting Millennial Advisors
2. Recruiting and Managing a Millennial
3. Recruiting Gen X Advisors
4. Recruiting and Managing Gen X Advisors
5. Recruiting Boomer Advisors

Signed copies of two of Cam's most popular books:

The Gen-Savvy Financial Advisor – Advising the Generations in the New Age of Uncertainty, Revised 2017

Generational Insights – Practical Solutions for Understanding and Engaging a Generationally Disconnected Workforce

12 months enrollment into the Gen-Savvy Financial Advisor online coaching community.

12 month enrollment into the Gen-Savvy Financial Advisor Coaching's "Inner Circle"

Live interactions during special webinars and conference calls where Cam engages directly with participants.

TO PURCHASE 10 OR MORE PACKAGES, PLEASE CALL US FOR PRICING.

GENERATIONAL INSIGHTS

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