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 Boomers-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

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.

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