### 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 the Gen X Woman
      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: Adultelettes
      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.

**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 +/- 2000)**
  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 Audit Package Plus:** A total of one year’s access to all features.

**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.**

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