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**Cam’s keynote presentation was thoroughly engaging as well as topical. Our focus on generational wealth and his delivery of Selling Across the Generations provided relevant action items to all attendees. The feedback was overwhelmingly positive.**

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**NINA STALEY - Senior Vice President**

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### ABOUT THE CLIENT

Northern Trust is a global leader in delivering innovative investment management, asset and fund administration, fiduciary and banking solutions to corporations, institutions and affluent individuals. For 125 years, the company has evolved with the changing needs of its clients and the global marketplace.

### BUSINESS NEED

Northern Trust has a business and investment philosophy that is geared toward meeting the unique and differentiated needs of its clients. Its partners and advisors take part in continual training and development to allow them to provide clients with quality guidance and advice. As wealth moves through the generations, Northern Trust understands that there are diverse needs and communication preferences of their primary client base – Baby Boomers – as well as the next generations. Cam Marston has provided multiple presentations to leadership groups within Northern Trust, and was asked to return to deliver a keynote speech to kick off an educational conference focused on a broad range of investment strategies and topics. Cam’s presentation was designed to balance the technical content with a focus on business and sales insights.

### INSIGHT AND IMPACT

Cam delivered an adaptation of his “Selling across the Generations” presentation, customized for the financial advisor audience. As always, he offered attendees a host of statistics to back up the engaging stories of behaviors, attitudes and expectations that exist in each generation. Northern Trust’s wealth advisors and portfolio managers learned how to engage the children of their current clients in order to maintain the family business relationship and be seen as valuable advisors in succession planning as well as wealth building and retention. Though presented as a keynote speech over dinner, Cam encouraged open discussion and the engaged audience took advantage with a lively Q&A segment at the conclusion of the formal content. As one attendee commented in the post-conference survey “It was interesting to learn how to target multiple generations as well as multi-generational families. Very useful.”