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The next generation of financial services client has arrived.

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For decades financial services have focused on demographic groups that are now moving into and past retirement. The Matures (born 1945 and prior) and the Baby Boomers (born 1946 – 1964) are the generations that the financial services industry grew up with, and their client relationships were defined by traditional business models. Now, new generations who have different economic and cultural experiences are moving into age ranges that make them prime markets for investments, retirement planning, insurance, and other financial services.

The challenge for financial advisors today is to provide financial services and create new advisorclient relationships that match the expectations and experiences of the next generation of investors. New generational attitudes have surfaced in response to the Great Recession and its aftermath and advisors need to understand not only each generation’s characteristics but also each generation’s distinct anxieties and concerns prompted by the downturn.

Some figures that reflect the coming changes:

- The 40 to 59-year-old demographic among potential clients will only grow 1% between 2005 and 2020.
- 29% of wealthy investors are under 50 years of age and they control 37% of potential investment assets, representing \$18.6 billion in potential revenue for advisors.
- Investors between 18 and 50 years old will inherit more than \$41 trillion in assets by 2052.

Cam Marston understands the attitudes and expectations of the upcoming generations and what they expect from service providers. He has learned how they buy, how they value different types of information, what their definition of “expert” is and how they apply it to financial advisors,

and what they want financial advisors to teach them. He understands their preferred methods of communications and what sales tools to use and how to use them effectively. As an Investment News columnist and the author of *The Gen Savvy Financial Advisor*, Cam provides tips, ideas, and examples for how to best court and serve each generation of client. His presentations are full of “take home value” content, even giving his audiences the words to use in specific scenarios.

The next generation of financial services client has arrived. They will not tolerate being treated the same way their parents were treated. Learn what they want in this exciting presentation.

For more information

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