

Cam Marston

\$20,000 to \$25,000

Recognized as the Leading Expert on the Generations

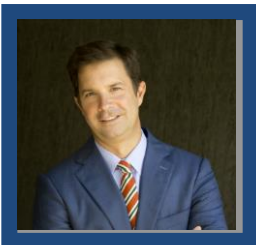
Marston and his firm, Generational Insights, have provided research and consultation on generational issues to hundreds of companies, ranging from small businesses to multinational corporations, as well as major professional associations, for over 16 years.

Marston's presentations are informative, engaging, and humorous. He offers concrete demographic research that is tailored to his audience. But he enlivens the data with anecdotes, tales from the real business world, and quips that make the message memorable.

The challenge for financial advisors today is to provide financial services and create new advisor-client 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.

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.

Video: [The Gen-Savvy Advisor](#)



Amy Lynch

\$5,000 to \$10,000

Strategies for Engaging the Generations

Her job is not just giving presentations. It's starting conversations. Amy's presentations and training programs go beyond generational awareness to generational strategy—an approach they call Generations 2.0. Amy will show you how to harness the business-essential traits of the generations and put them to work. The result Breakthrough engagement and customer loyalty — the Generational Edge that sets you apart from your competitors. From the kick-off call to final interviews and edits, their goal is to give your audience the do-it-today ideas and skills that address your specific generational challenges.

The author of Gen'Tellect: The Generational Intelligence Essential to Your Success, Amy uses eye-opening statistics, case studies and been-there Boomer humor to give audiences do-it-today takeaways. People find that Amy's generational stories parallel their own. They may arrive saying, "That generation is impossible," but they leave saying, "I can work with that."

Throughout her presentations you will learn how to identify differences in generations, basic messages that motivate each generation, and the ones that turn them off. You will learn to recognize the expectations that resonate with Gen X, Millennials, Gen Z and Baby Boomers. She will teach you to spot emerging generational trends and employ them in communication.

Video: [Generational Edge | What They Do](#)



Anne Loehr

\$5,000 to \$10,000

Trends Shape Future Leadership: Dubbed "The Generational Guru" by the Washington Post

Anne Loehr is an internationally sought after keynote speaker, writer, consultant, and trainer. She helps leaders and sales professionals connect today's everyday decisions to the future workplace. Her end goal is to help organizations & individuals retain their top talent and clients and not only survive, but thrive.

Being the best Financial Advisor for all of your clients requires understanding what shapes the core beliefs and values of all generations, so that you can form deep client relationships with each generation. Once you understand the language and culture of each generation, you can build rapport and trust more effectively from the moment you start to reach out.

Anne's presentations give Financial Advisors strategies and action steps for: overcoming a range of generational challenges, communicating effectively with each generation, bridging generational gaps between Gen X, Millennials' and Baby Boomers, increasing net new assets, maintaining assets under management, developing long-term clients, and creating a diversified book for your practice.

Video: [Leveraging the Strengths of Each Generation](#)

Anna Liotta

\$10,000 to \$15,000

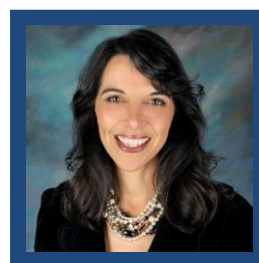
What Makes the Generations Tick and What Ticks Them OFF!

Anna Liotta, creator of Generationally Savvy™ Communication Solutions, is an award-winning speaker, consultant and author who engages and energizes national audiences with her practical strategies for attracting, growing and retaining top talent and loyal clients from every generation. Anna is a communications consultant specializing in generational leadership, diversity and sales solutions.

Anna helps audiences see how members of each generation think, behave, and engage. She guides you to overcome the "generation gap" so you can effectively communicate and develop meaningful relationships with team members and clients of all ages.

In her presentation, Building a Multi-Generational Practice, Anna leads advisors through the "Generational Codes," communication styles and priorities that can develop or destroy the bridge to the new generations. Advisors and managers learn how to improve their effectiveness in cultivating strong inter-generational relationships through "Generational Savvy™" principles to attract new clients, deepen relationships with family members of current clients and retain assets under management.

Video: [What Makes the Generations Tick and What Ticks Them Off!™](#)



Lindsey Pollak

\$15,000 to \$20,000

Recognized as the Top Expert on the Millennial Generation in Today's Multigenerational Workplace

New York Times best-selling author Lindsey Pollak takes the guesswork out of engaging the largest generation in today's workplace. She is the leading voice on millennials in the workplace, trusted by global companies, universities and the world's top media outlets — and, most importantly, by millennials themselves. Often called a "translator," Lindsey advises both millennials looking to succeed in today's work environment and the organizations that want to recruit, retain and market to them.

For the first time in history, four generations are sharing the workplace — and sometimes it feels like they're living in four different worlds. How can you successfully work with the Traditional Traditionalists, Still-Booming Boomers, Xtra-Independent Gen Xers and your own peers, the Tech-or-Die Gen Ys? The answer is crucial to your day-to-day productivity and your long-term career success.

In her dynamic program, Succeeding in the Multigenerational Workplace, Lindsey shares expert insights into the four generations and their motivations, goals and communication styles. You will gain specific, actionable strategies to manage cross-generational challenges and turn multi-generational understanding into a competitive advantage. Your audience will discover potential points of generational conflict and tactics to handle them. They will learn how — and why — to defy millennial generation stereotypes, and gain specific strategies to strengthen their cross-generational communication skills.

Video: [Managing Millennials](#)

