MILLENNIALS & MONEY

Reaching the next generation of clients

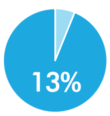
There is a lot of hype around the topic of Millennials – but what is the real opportunity for financial advisors today, and how should they be engaging differently with this demographic?

By cutting through the noise and diving deep inside the minds of Millennials, we help advisors understand the scope of the Millennial client opportunity as well as the strategies to best communicate their value add as an advisor and resource to this new demographic.

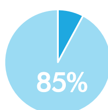
WHAT WE COVER

1 WHO ARE MILLENNIALS & WHY SHOULD YOU CARE?

Millennials exhibit unique behaviors and values when it comes to money.[1]



In 2016 millennials represented 13% of U.S. High Net Worth Investors.[1]



85% of Millennials say they consider their investment decisions as a way to express their social, political and environmental values.[1]

2 REIMAGINING THE WEALTH ADVISORY BUSINESS

How can financial advisors position themselves and their team to better reach, retain and communicate with Millennials?

3 MILLENNIALIZING YOUR COMMUNICATION

How can financial advisors develop communication strategies that will engage and appeal to the next generation of investors?

4 HOW TO GET STARTED TODAY

What small steps can financial advisors take *immediately* to acquire and serve Millennials today and in the future?

LEARN MORE

For more information on the Millennials & Money seminar, please visit paxworld.com/millennials or email FAresources@paxworld.com

[1]U.S. Trust Insights on Wealth and Worth, June 2016, http://www.ustrust.com/publish/content/application/pdf/GWMOL/USTp_ARXDJKR8_2017-05.pdf

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