

NEIL WOOD CONSULTING

Helping *Financial Advisors* Gain More *Referrals* Have More *Fun* and Find More *Time*



Neil Wood is the President at Neil Wood Consulting. He travels throughout the United States and North America as a keynote speaker sharing his expertise on how to strengthen client relationships, get introduced to high quality referrals, gain more assets and how to host successful client events. He has also given thousands of presentations on how to market yourself and your business more successfully, since he became a full-time speaker in 2000.

Professionally, Neil has spoken in front of more than 28,000 people over the last 14 years. His presentations are based on his extensive research, his own life experiences and experiences of the thousands of successful people he has met and interviewed in the last forty years. He has been involved in the financial services industry since 1987 and has learned by working with the Best of the Best in sales. Neil's new book, *The Best Practices of Successful Financial Advisors* was published in 2014 and became an Amazon Best Seller in October. His goal is to teach salespeople how to find more time, make more money and have more fun!

The Affluent Millennials have arrived and they are NOT like your Baby Boomer or Affluent GenX clients.

ARE YOU PREPARED FOR THE NEXT GENERATION?

Financial service providers face dramatic and historic changes over the next 20 years. An epic transfer of more than \$59 trillion dollars in wealth to the 15.5 million Affluent Millennials will give them exceptional power as they reshape the future of the financial industry, business models and marketing strategies. The firms that meet them within the Affluent Millennials social networks, their style of communication and approach will thrive, while other providers will likely fail miserably.

There are numerous differences between the Affluent Millennials, Millennials, the GenXers and Baby Boomers. Making the mistake of marketing to them like the other two generations will be like entering a Ferrari automobile race with a mini-van. Good luck! This could be the next Great Generation and they are ready! The financial advisors that want a piece of this \$59 trillion better be ready also.

AFFLUENT MILLENNIALS:

- > There are 5 primary factors AMs look for in financial service providers. Knowing these will help you succeed greatly
- > They are progressive and have an optimistic outlook for their future. Their levels of trust and confidence are unparalleled
- > There are 77 million millennials but only 15.5 million Affluent Millennials
- > They are control freaks and want to conduct research within social media before they make important financial decisions
- > Social-centric and open-minded to non-traditional investments
- > 72% believe that the sacrifices they make now will pay off ahead
- > 3x more likely than GenXers to establish a charitable foundation
- > They save a median 24% of each paycheck vs. 18% for GenXers
- > They want complete control over their final financial decisions but 87% value guidance and support from financial advisors
- > One-third of AMs don't have a retirement account yet
- > Affluent Millennials are especially active on LinkedIn in these particular areas

