

# Driving Growth Through Multigenerational Relationships



## Cultivate Relationships: Engage the Younger Generation With Savvy and Creativity

Many younger people today are committed to improving the world in some way, and many young adults grapple with personal debt. Offer them interactive opportunities to learn, network with peers and celebrate milestones. The right blend of activities, information and social engagement will get your relationship off to a strong start.

### Top 10 Ways to Connect With Younger Clients

- 1 Get With the Program**

Chances are most financial professionals use Microsoft Word. Learn how to create and exchange documents with clients' younger children and grandchildren on Google Docs.
- 2 It's Five O'Clock Somewhere**

Host virtual Happy Hours with next-generation clients from numerous client families in order to form a next-gen network. Position your business as a central hub for networking among young professionals.
- 3 The Coffee Talk**

Host informal sessions on Sunday mornings for younger clients and prospects after workouts, runs or errands. Select a topic such as paying down student debt, taking advantage of a 401(k), saving for a first home or condo, etc., that relates to their age and stage in life.
- 4 The 19th Hole**

Never underestimate the power of a charity golf tournament to bring together all ages of a client's family.
- 5 No Styrofoam Packaging Allowed**

Create an event to benefit a local park or preserve by inviting like-minded clients and prospects to hear from a conservationist or head of the park services in your area to address sustainability and ecological issues.
- 6 Night at the Museum**

Arrange a private virtual tour of an art exhibition at a museum or gallery—with wine and cheese afterwards.
- 7 Pomp and Circumstance**

Host a virtual celebration for all your clients' recent graduates. Ship gift bags with your branded docking stations, portable phone chargers and articles of interest to younger generations.
- 8 Reel Progress**

Grandparents are eager to entertain visiting adult children and grandkids. Invite grandparents to a special Movie Event using NetFlix Party or another platform, and moderate a lively group chat to keep children of any age engaged.
- 9 Community Action**

Create family events around community service related to your clients' interests. Organize online or offline activities that a whole family can participate in—whether for groups of clients or for a special client and his family.
- 10 Beyond the Coffee Talk**

Create financial literacy seminars for groups of your clients' children and grandchildren. Nearly 80 percent of parents say they want to be financial role models for their children, yet 42 percent have not discussed basic financial skills. Make this part of your brand by adopting a school.

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