

Super Seminar Tips & Tricks[®] by Frank Maselli

Episode 18: **Boomers Not Allowed!**

Retirement seminars are by far the most popular these days and there's certainly logic to that. Retirees probably need the most help with the most wealth. But don't forget the millions of investors who are still in "accumulation phase" of their journey.

There are over 150 million Gen X'ers, Millennials and Gen Z's who are rapidly amassing wealth and need your guidance. Retirement is many years away for them and they are eager for growth strategies and advice.

What was old is new again!

I started my career with these seminars with my most popular one called "*The 10 Commandments of Investing*." It was a major hit! I'm re-launching that, so let me know if you're interested. It was great fun to deliver and attracted some amazing clients.

This seminar covers all the basic strategies that growth investors need to understand like asset allocation, diversification, re-balancing, and how to control their emotions during the ride.

There's less focus on guaranteed income ideas or estate planning because those are not the main concerns at this stage.

3 Major Benefits!

Attendees at a "growth" seminar might not be the wealthiest crowd, but there are some benefits to consider, especially if you're a younger advisor. BTW, the natural "relationship range" is 10 years on either side of your age, so do the math.

A lifetime bond

It can be great to find people with whom you can grow over the course of time and your mutual careers. The bond you can build with these clients is one of the hidden joys of our profession.

Also, many younger clients would love to work with an advisor who will be around for a while. With the average advisor age these days around 70, these younger clients don't feel a connection with our profession. But as their needs and assets grow...they will want professional advice.

Why do you think all the major brokerage firms are frantic to find younger advisors and stick them onto teams? One big reason is to keep the assets from flying out the door when the Boomer parents pass away. There's \$60T in assets moving in the Great Wealth Transfer.

Less competition

There are fewer advisors chasing younger clients so you have more room to maneuver. You could differentiate yourself in a crowded seminar market where retirement topics abound. This could be a major branding opportunity that would generate some press or "influencer" buzz in your community.

Many successful younger investors would never attend a "retirement" seminar because they don't see themselves in that group. It's just not their main hunt at this stage of their lives. They are actively turned off by the subject.

Reverse referrals

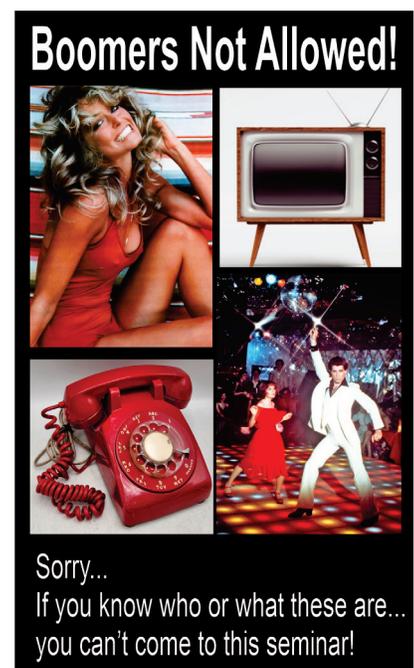
This is a fascinating possibility that you might not have considered. If you did a really great "growth" seminar and built a connection with a 35 or 40-year old client, odds are they have parents in that retirement stage. You could earn a reverse referral when "**The Beaver**" tells **Ward and June*** how great you are.

The parents might be eager to talk with someone who will be around to advise their kids when the time comes. Chances are their current advisor is probably going to retire before they do! This is another reason you should always talk about growth strategies, even at your retirement seminars.

The whole "reverse referral" idea is new because the Boomers didn't have parents they could refer us to. No one lived that long or had any real money. Today this is a MASSIVE opportunity!

I've envisioned how I might create an invitation to my growth seminar today. It might include something like this.

Consider adding a great growth seminar to your repertoire. You might find it to be something that helps you build some life-long relationships with great people!



*If you don't know who Ward, June, Wally and The Beaver are...you're the perfect person to be doing these seminars!