



Motivating Multiple Generations



Traditionalists



Baby Boomers



Generation X

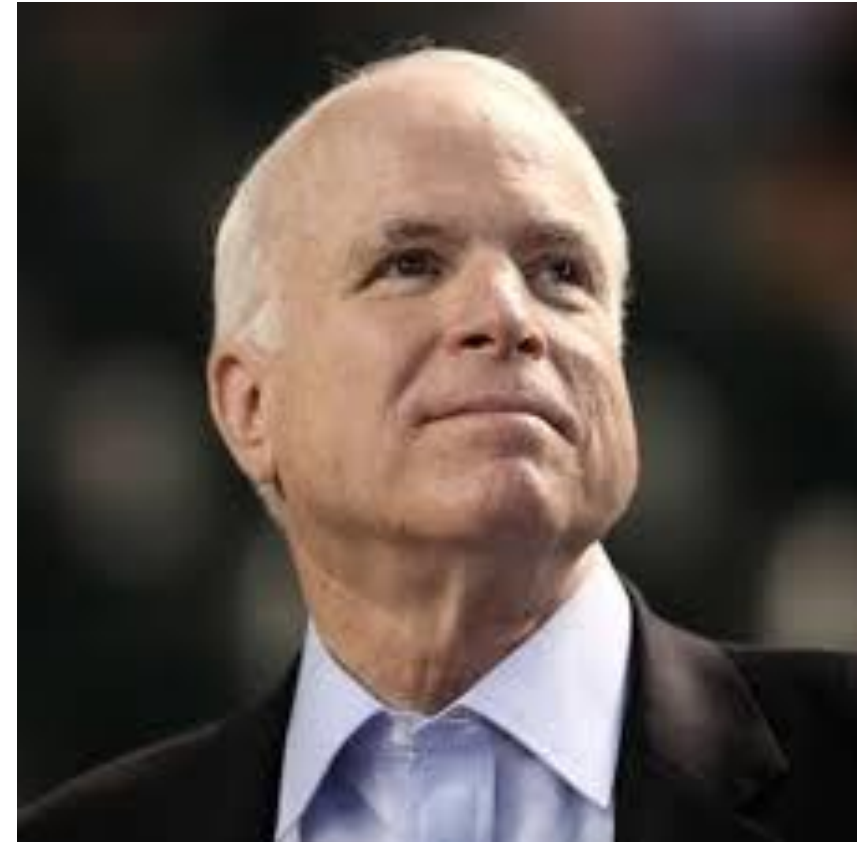


Millennials
(Generation Y)



Generation Z

Motivating Multiple Generations



Traditionalists

1925-1945



Baby Boomers

1943-1964



Generation X

1965-1980



Millennials

1981-2000



Generation Z

2001-2020

Motivating Multiple Generations

WHAT ARE THE VALUES OF DIFFERENT GENERATIONS



Traditionalists

*adherence to rules, discipline,
family focus, hard work,
and trust in the government*



Generation X

*balance, diversity,
lack of loyalty to
an organization,
and a global mindset*



Baby Boomers

*anti-war, anti-government,
equal rights, involvement
and personal gratification*



Millennials

*achievement, fun, civic duty,
sociability and self confidence*

Motivating Multiple Generations

Traditionalist

- Offer to facilitate wealth transfer conversations
- Show them their loyalty isn't taken for granted
- Showcase your involvement in the community
- Prove you are the right advisor for their heirs
- Give them the gift of your time
- Position change as evolution vs. revolution

Baby Boomer

- Keep communication positive
- Skip traditional retirement language
- Recognize strong Boomer parent-Millennial child relationships
- Offer to facilitate difficult wealth-transfer conversations
- Keep them up-to-date on innovations
- Help Boomers prioritize their many responsibilities

Generation X

- Be a resource and an expert
- Anticipate skepticism
- Speak with 100% transparency
- Use unfiltered and direct communication
- Don't get defensive
- Make every process efficient

Millennial

- Make finances an approachable topic
- Show them how they can make a difference
- Clearly communicate your accessibility
- Bring their voice to the table
- Offer education
- Embrace innovation

Generation Edge

- Start the conversation now
- Get in their friendzone
- Personalize your interactions with them
- Keep it visual
- Encourage engagement in content
- Suggest a game plan

Motivating Multiple Generations

Generational Perceptions of Mentoring			
Traditionalist (1922-1945)	Baby Boomer (1946-1964)	Generation X (1965-1980)	Millennial (1981-2000)
Mentoring = An obligation	Mentoring = A way to get ahead	Mentoring = Collaboration	Mentoring = Learning connections



exo

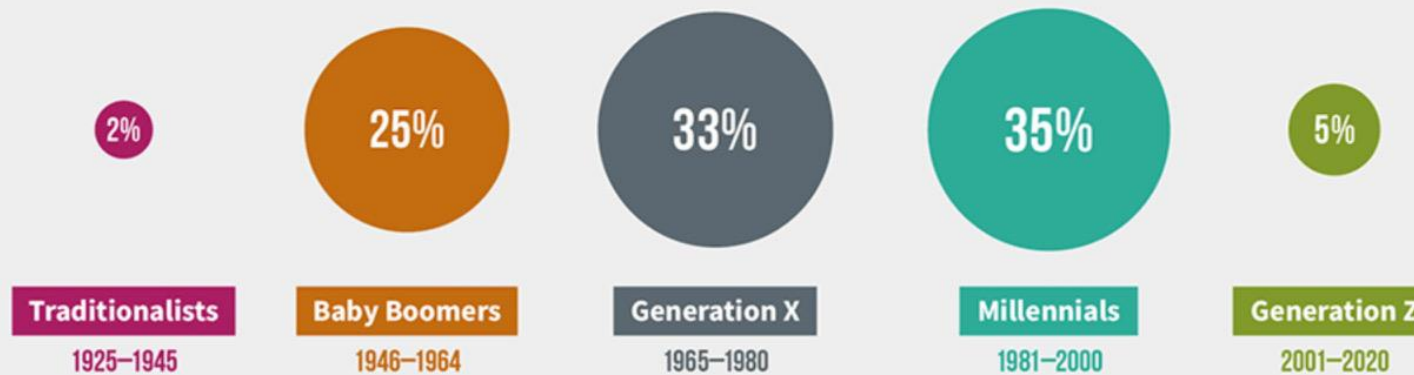
How to manage
**different
generations**
in the workplace



GENERATIONAL DIFFERENCES IN THE WORKPLACE

One size doesn't fit all when it comes to today's workforce—five generations of workers means five approaches to work.¹ Learn how to adjust to a multigenerational workforce.

Current U.S. workforce numbers²:



Generations in the Workplace



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