John Hancock Investment Management

COMMUNICATING YOUR VALUE

Generational intelligence to build a sustainable and growing practice

One of the biggest challenges in financial services today is building a growing, sustainable, and valuable practice. The key is to reach all generations and intentionally build a profitable practice for today *and* for tomorrow.

Wealth transfer among generations has begun. By 2030, more than $15 trillion in global wealth will be passed down.[1] Individuals want to work with someone who can understand their specific situation.

This program is designed to help you understand the different generations and to define specific strategies and solutions for reaching them, including:

- Developing generational intelligence
- Methods for multigenerational communication of value
- Strategies for retaining assets through the next generations

Presentation

Workbook

For more information or to set up a presentation, contact your John Hancock Investment Management business consultant at 800-225-6020 or visit jhinvestments.com.

1 A generational shift: Family wealth transfer report, 2019," Wealth-X, June 26, 2019.

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