

The industry is facing many tough challenges, from asset retention and client acquisition to succession planning and advisor development.

Asset Retention & Client Acquisition

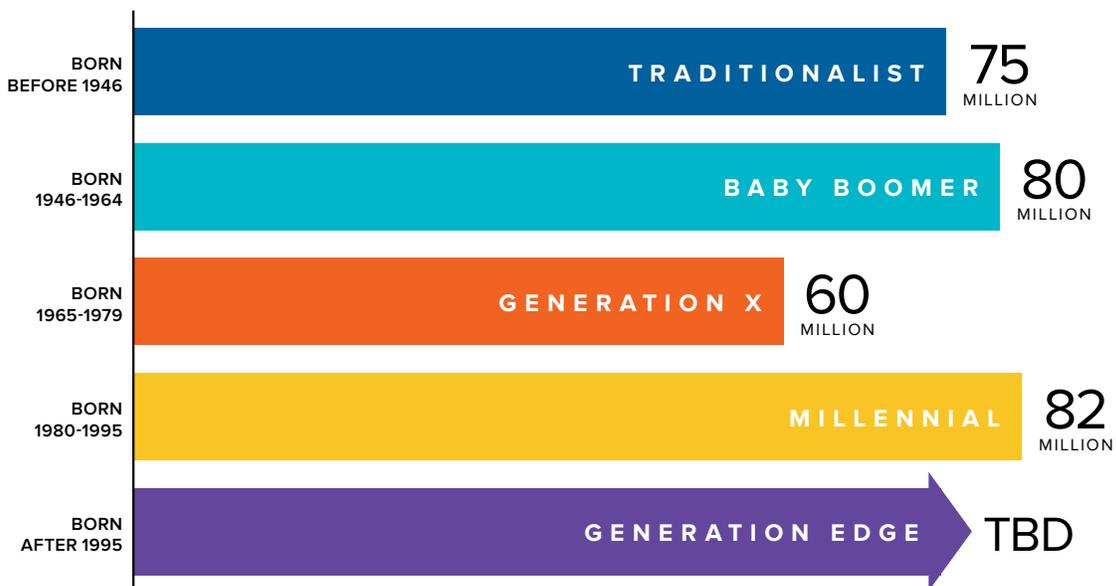
- More than \$59 trillion will pass from one generation to the next¹
- 90% of prospective heirs say they will move assets to another firm once they receive their inheritance²

Succession Planning & Advisor Development

- Less than 20% of owners or partners of financial advisory firms have a succession plan³
- Which change is the wealth industry least prepared for? — The rise of Millennial investors⁴

Ivy Investment’s award-winning GenLink program⁵ offers a suite of generational materials designed to bring cutting edge research and insight to financial advisors by exploring demographic shifts, personalities and financial outlooks of each generation.

THE GENERATIONS⁶



From Traditionalist to Generation Edge, advisors must understand each of the generations in order to continue growing their businesses.

TRADITIONALIST born before 1946	BABY BOOMER 1946-1964	GENERATION X 1965-1979	MILLENNIAL 1980-1995	GENERATION EDGE born after 1995
<ul style="list-style-type: none"> • Loyal • Desire to leave a legacy • Faith in institutions 	<ul style="list-style-type: none"> • Competitive • Questioners of authority • Optimistic 	<ul style="list-style-type: none"> • Skeptical • Highly adaptive • Independent 	<ul style="list-style-type: none"> • Realistic • Environmentally conscious • Collaborative 	<ul style="list-style-type: none"> • Connected • DIY entrepreneurs • Diverse

Advisors who create experiences that better relate to each of the generations have the opportunity to cement a loyal client base and capture assets in motion.

There are **5 MILLION** Millennial millionaires.⁸

65% of **BABY BOOMERS** plan to work past 65 or do not plan to retire.⁷

45% of **Gen Xers** **WILL NOT** have enough money for retirement.⁹

Advisor Link

Ivy Investments has developed GenLink to cover the ways advisors like to learn, including:

- Reports on how to better reach each generation
- Short and engaging videos
- Articles addressing current generational topics
- Infographics
- Client facing materials
- Interactive e-Learning (CE approved)
- Presentations and keynote addresses
- Resources to help recruit and retain the next generation of advisors

GENLINK™

Ivy Investments offers the GenLink program to help you understand each generation, cement a loyal client base and capture assets in motion. Go to ivyinvestments.com to view GenLink reports, videos, articles, infographics and eLearning tools available.

¹Center on Wealth and Philanthropy, Boston College, 2014.

²Pershing Succession Planning Report, 2011.

³Data presented in this Web seminar is based on an online survey conducted among 272 partners and owners of their financial advisory firms. Surveys were conducted in September and October 2014 among subscribers of Financial Planning and On Wall Street. Respondents were classified into four segments using latent class analysis that defined their succession planning stages and other key indicators to determine the needs of the market.

⁴Shagrin, M. (2014, April 28). Merrill, UBS Plot to Capitalize on Demographic Shifts.

⁵In 2016 the GenLink program won a Star Award from the Mutual Fund Education Alliance for Advisor Communications Campaign - Medium Asset Level category.

⁶Lancaster, L. & Stillman, D. (2014, July 17). BridgeWorks BridgeBuilder Manual [Training Certification]. BridgeWorks, Minneapolis, MN.

⁷TransAmerica Center for Retirement Studies. (2014, April). The Retirement Readiness of Three Unique Generations: Baby Boomers, Generation X, and Millennials.

⁸Shullman Insights into Luxury, Affluence and Wealth. (March 2014). Insights into Affluence, Luxury and Wealth: Millionaires Have Their Own Generation Gap.

⁹Taylor, P., & Gao, G. (2014, June 5). Generation X: America's Neglected 'Middle Child'.

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