

THE MONEY SANDWICH

"When he is passionate about a subject you can't help but be drawn in by that level of enthusiasm"

- Michelle, Standards International

"Marc has the ability to deliver difficult to understand concepts in a down to earth manner"

- Terry, Keyman Financial Services

UNDERSTANDING THIS 21ST CENTURY INTERGENERATIONAL PHENOMENA AND WHEN IT COMES TO FAMILY, IT'S RARELY ABOUT THE MONEY.

Advisers are looking to increase the number of High Net Worth clients they have. This coincides with the largest wealth transfer, as boomers start transferring their wealth to the pre-retiree generation of 40s, 50s and 60s age groups over the next 20 years.

How do you talk to this 21st century intergenerational phenomena, what I call the 'Sandwich Generation'? That is, the age group with teenagers and adult children on one side, and elderly parents on the other, all the while looking at financial freedom on the horizon for themselves. What's their triggers, what's their 'keep them up at night?' moments. Understanding their unique drivers and emotional challenges, is the secret to building strong relationships with your prospects and future clients, and ultimately advocates for you and your business.

In this presentation, Marc Bineham, speaker, money coach and an award-winning author of The Money Sandwich, is going to provide you and your advisers with the unique money concerns this new generation face.

Key take-aways:

- **Who are the Sandwich Generation** and why is this important to you?
- Learn how **Financial Freedom is the new Retirement** and help your clients retire on their own terms.
- **Get your client's money working harder for them**, and why we need to think differently about Risk Profiling.
- Learn how to help your clients have **'The Conversation'** with their elderly parents, while help their millennial children get a financial a head start in life.
- Finally, how to **build a business with consistent referrals** and value for money service offering.

Advisers, especially those wanting to specialise in the sandwich generation, will leave this presentation, with more clarity and understanding around this new 21st century intergenerational phenomena.

THIS PRESENTATION CAN BE ADAPTED FOR IN-PERSON, HYBRID OR VIRTUAL CONFERENCES, EITHER AS A KEYNOTE OR WITH THE OPTION TO INCLUDE A HALF DAY WORKSHOP PROGRAM.

MARC BINEHAM

MONEY COACH | AUTHOR | SPEAKER | PODCASTER

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