



# Connecting with Millennials

## Keys to Communicating Correctly

### Question:

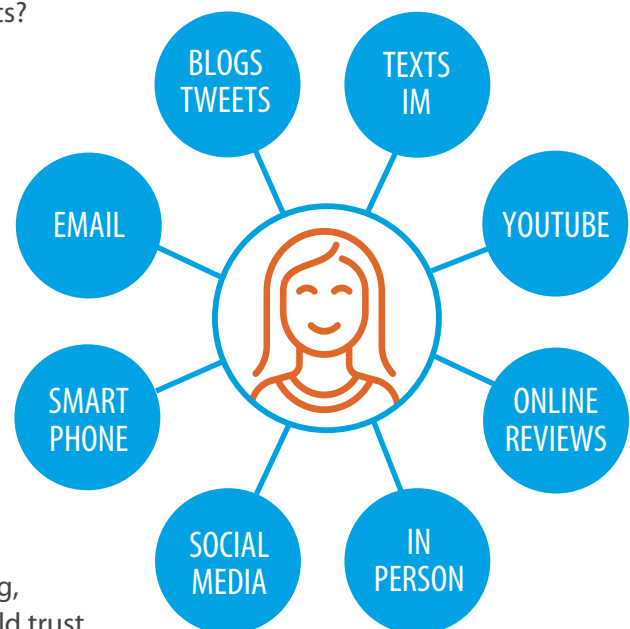
What is the best way to communicate with Millennial clients?

### Answer:

There is no one answer. No “magic bullet” or single type of communication they may prefer. In fact, they may desire to use *all forms* of communication available to them.

As younger generations have grown up, they have been surrounded by growing technology, creating many more communication methods. So they may use all of them to connect -- email, text, social media and more.

The key is to communicate in kind where it makes sense. Be aware of the method people utilize to contact you as senders may expect you to respond in a similar manner. Seek out their preference and don't assume otherwise. It's a smart strategy, in personal or business communicating, that can create connections, develop relationships and build trust.



### Communication Style is Equally Important

Technology has affected more than just the methods of communication. It has affected the style as well. Take these ancillary aspects of modern communicating into account to maximize the impact of your messages.



#### INFORMALITY

Texting and social media messages are often brief and informal. This may allow you to follow suit.



#### FREQUENCY

Digital devices facilitate easy access. So users may be comfortable with more frequent contact from you.



#### IMMEDIACY

Technology offers immediate connectivity. So users may expect immediate responses to comments and inquiries.






## Generational Uniqueness

Unique technologies developed in recent decades have created unique methodologies and opportunities to communicate for recent generations. Understanding this uniqueness is the first step to valuing it ... incorporating it into your practice ... and connecting with it for shared success.

### CONNECTING THE DOTS TO FINANCIAL MATTERS

*Consider how to connect with Millennials when it comes to financial matters. They may not be prospects for some planning products at present, but they could very well be **beneficiaries** on annuities and life insurance policies. If so, here are some things to consider...*

#### Do and Don't: When a Millennial Is an Annuity or Life Insurance Beneficiary

-  **Do** engage them in the process. Many grew up in a participation oriented culture and may appreciate involvement in planning discussions.
-  **Don't** assume they want to communicate in the same way as the policyowner. Different generations have different preferences.
-  **Do** consider using frequent contact to keep them informed and involved. Share articles and information to help add value to the relationship.
-  **Don't** hesitate to follow their lead on the ways they may want to communicate. That can include the method, length and timing of the communications.
-  **Do** work with companies that offer a variety of content in a number of formats to help you build relationships with future clients. Examples include online financial calculators, YouTube channels, value add material and more. Here are examples of our company's offerings in these areas:

[INCOMEINPUTS.COM](https://incomeinputs.com)

[RETIREMENTTALKS.COM](https://retirementtalks.com)

[VALUEADDCENTRAL.COM](https://valueaddcentral.com)

Important: Financial representatives should comply with all relevant laws, regulations and internal policies when communicating with the public.

[WSFinancialPartners.com](https://WSFinancialPartners.com)

***Millennial Minutes** is a value add based on generational research. The program designed to help you connect and communicate with this valued generation in an effort to advance topics of financial planning importance.*