

ABOUT

- Money Mentor, helping Gen Z & Millennials turn money shame into money power
- Lillywhite Award Winner for extraordinary lifetime contributions to US economic security in 2020
- Morningstar's Asset Allocator of the Year in 2014
- J.P. Morgan Chase Executive for three decades
- Award-Winning Author of *Your Best Financial Life*
- Cofounder, Aspen Leadership Forum on Retirement (with AARP)
- Founder & CEO of Move the Door Enterprises
- Fullbright research fellow; graduate John Hopkins, Princeton

WORLDCLASS SPEAKER & PARTNER:



J.P.Morgan BARRON'S

GO-TO MEDIA EXPERT:

THE WALL STREET JOURNAL

The New York Times

Forbes



Bloomberg
TELEVISION

yahoo!
finance

"Anne is a pioneer and innovator!" ~Morningstar

SIGNATURE KEYNOTE

Your Millennial & Gen Z Clients Don't Trust You... Yet:

How to connect with them and turn their money shame into money power.

Millennials & Gen Z mistrust institutions. This is a result of being followed by targeted ads – *or being sold to* – their entire life. For you, financial advisors and professional service providers, this isn't your fault, but it *is* your challenge.

Compounding the challenge, 70% of Millennials & Gen Z have negative, shameful feelings about money. **But you're in luck.** Industry legend Anne Lester left JP Morgan after 30 years to be their Money Mentor. With Anne, you can turn their money shame into money power – so they can live their best life and do their best work now.

Learning Objectives:

- Understand the key experiences that shaped Millennials & Gen Zs and their relationship with money
- Learn why that experience matters and how it impacts their decision-making today
- See how storytelling and empathy will immediately connect you with your clients

Topics:

Millennial & Gen Z Communication, Client Management, Business Growth Strategies, Generational Divide, Retirement Services

Audience:

Financial, insurance, law and other professional service firms serving Millennials & Gen Z



Book Anne for your next event!

Anne is a master storyteller, simplifying her decades of research into simple, must-have frameworks. Email Anne's team at speaking@annelester.com to learn more.

AnneLester.com