

Absolute Engagement

The background features a dark blue gradient with a complex pattern of glowing orange lines that resemble a circuit board or data network. These lines are primarily concentrated on the right side of the image, extending from the top right towards the bottom left, creating a sense of depth and movement.

Julie Littlechild

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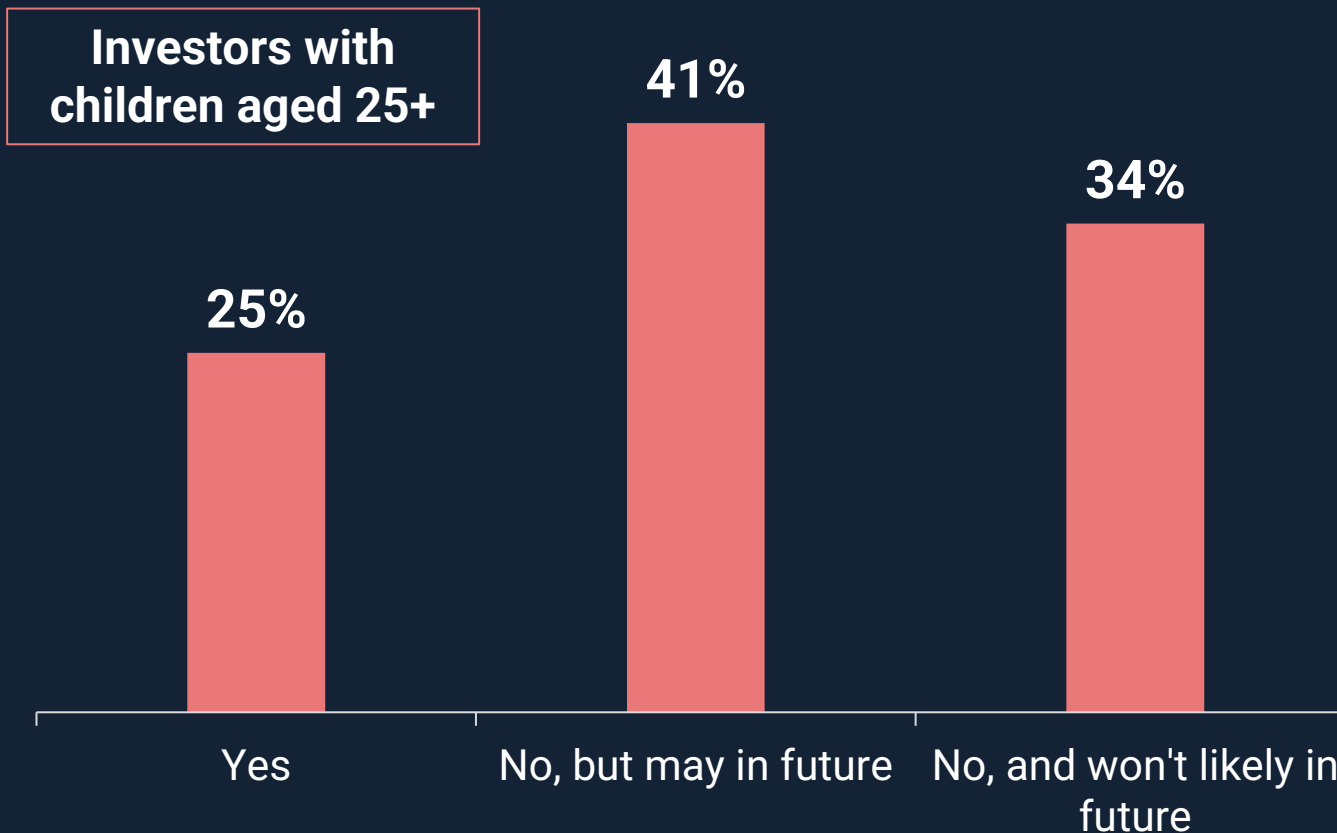


ABSOLUTE ENGAGEMENT ENGINE

Award-winning engagement technology that accelerates growth and engagement, using real-time data on the TRUE needs of your prospects and clients.

Learn more at www.absoluteengagement.com

The obvious risk.



Q: Do you adult children currently use your financial advisor?

The **hidden** risk.

Once introduced by their parents, younger clients don't connect with the experience being delivered.

The **obvious**
opportunity.



**% OF INVESTORS WITH CHILDREN THAT PLAN ON
TRANSFERRING SOME PORTION OF THEIR WEALTH**

The **hidden** opportunity.

Understanding the needs of families, and supporting them in planning across generations, is one of the most significant **engagement** opportunities.



And **engagement drives growth.**

**Clients with
children are
more likely to
refer**

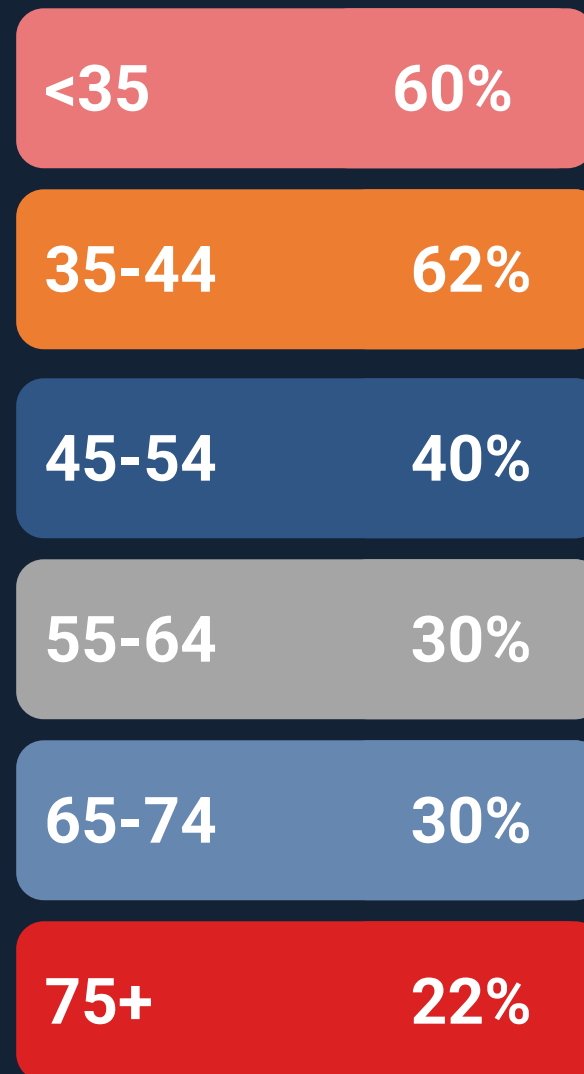
Net Promoter Score: 61 vs. 46

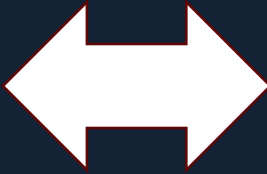
Referral rates: 47% vs. 33%

Engagement: 37% vs. 26%

% Referring

**Younger clients
are more likely
to refer**





Ensuring my family is taken care of when I pass away

Ensuring my children make good financial decisions

Personal or family health

Dealing with the rising costs of health/long-term care

The impact of current market volatility on my ability to reach my long-term goals



Ensuring my family is taken care of when I pass away

Caring for elderly parents or family members

Personal or family health

Ensuring my children make good financial decisions

Managing personal or financial stress

Dealing with the rising costs of health/long-term care

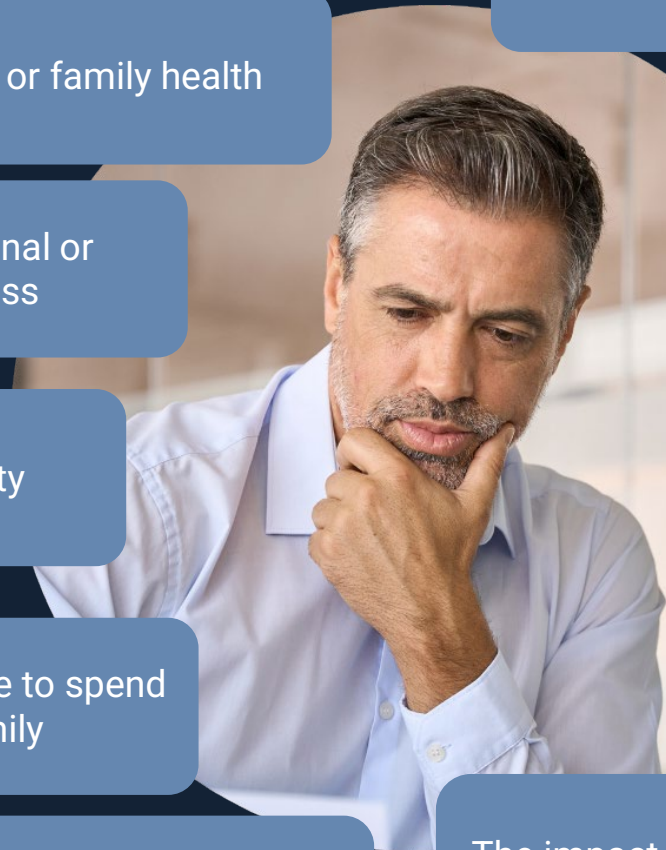
Personal job security

Feeling fulfilled in retirement

Having enough time to spend with my family

The impact of current market volatility on my ability to reach my long-term goals

Having enough money to retire comfortably



Questions?

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Access ongoing insights through our blog



absoluteengagement.com/blog