

EXECUTIVE BIO.

For Meeting Planners and Leadership Audiences

CAM MARSTON



Generational expert, author, and keynote speaker

Cam Marston is a leading expert on the generational trends shaping today's workplace, workforce, marketplace, and retirement landscape. Since 2000, he has helped tens of thousands of people and hundreds of organizations reduce generational frustration and improve communication, leadership, sales, recruiting, retention, and client relationships. His work is known for making complex demographic shifts practical: audiences leave not just understanding the generations, but knowing what to say, what to ask, and what to do next.

Cam is the founder of Generational Insights and the author of five books, including *Generational Insights*, *The Gen-Savvy Financial Advisor*, and *What Works: The Ten Best Ideas from the First 200 Episodes*. His research and consulting have served organizations ranging from small businesses to multinational corporations and major professional associations. His client list includes Kaiser Permanente, Charles Schwab, BASF, Nestle, Fidelity, Warner Brothers, ESPN, Qualcomm, RE/MAX, Eli Lilly, NASA, the U.S. Army, and the Million Dollar Round Table. His insights have been featured in the *Wall Street Journal*, *The Economist*, *Fortune*, *Money*, *Fast Company*, *Forbes*, CNN International, *Good Morning America*, and the BBC.

For financial-services and executive audiences, Cam brings unusual depth. His Gen-Savvy Financial Advisor work focuses on how different generations make trust, buying, and relationship decisions — especially as advisors work to retain Boomer clients, connect with Gen X and Millennial heirs, and prepare for the largest wealth transfer in history. His materials emphasize a core idea: older clients often value history, tenure, name recognition, and proven quality, while younger clients want to know how decisions affect their lives, their future, and their individuality.

Cam is also Co-Founder of PurposeNext and the PHASE Into Retirement™ framework, a research-informed system that helps individuals, advisors, HR leaders, and organizations address the non-financial side of retirement readiness. PHASE focuses on five dimensions — Purpose, Health, Activities, Social Life, and Everyday Life — and helps professionals bridge the gap between financial readiness and life readiness. Through PHASE, Cam extends his generational work into one of the most important transitions facing Baby Boomers and Generation X: designing a retirement that does not just last, but works.

On stage, Cam is informative, funny, plainspoken, and highly practical. He brings concrete research, real business stories, humor, and audience-specific takeaways that executives and meeting planners can trust to engage a room and send people home with usable ideas. Whether the topic is leading across generations, selling and serving different age groups, recruiting and retaining talent, or helping clients prepare for the life side of retirement, Cam gives audiences a clear view of what is changing — and a practical plan for what to do about it.

ONE-LINE POSITIONING:

Cam Marston helps leaders, advisors, and organizations understand what different generations value — and what to say and do next.

For more information contact

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