



PACIFIC
ADVISORS®

3 Pivots *for* Millennials (*and Gen-Z*)

- Eric McDermott



1

Pivot

1

Pivot
from
Sales
Culture
to
Marketing
Culture

1

Pivot
from
Sales
Culture
to
Marketing
Culture

*“Wherever there
is choice,
there is
competition.”*

1

Pivot
from
Sales
Culture
to
Marketing
Culture

*“Wherever there
is choice,
there is
competition.”*

*25 Years Ago
vs Today*

1

Pivot
from
Sales
Culture
to
Marketing
Culture

1

Pivot
from
Sales
Culture
to
Marketing
Culture

*“We all sell stuff
no one wants,
to get to the
outcomes
everyone wants.”*

1

Pivot
from
Sales
Culture
to
Marketing
Culture

*“We all sell stuff
no one wants,
to get to the
outcomes
everyone wants.”*

*Lead first,
Transact second.*

2 Pivot

2 Pivot *from* Commercials *to* Content

2 Pivot *from* Commercials *to* Content

Commercial 1.0
Look what I want to sell you!

2 Pivot *from* Commercials *to* Content

Commercial 1.0 
Look what I want to sell you!

2 Pivot *from* Commercials *to* Content

*“Wherever there
is choice,
there is
competition.”*

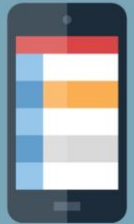
Commercial 1.0 
Look what I want to sell you!

2 Pivot *from* Commercials *to* Content

Commercial 1.0 
Look what I want to sell you!

2 Pivot *from* Commercials *to* Content

Commercial 2.0
Look how great we are!
(the “humble-brag”)



Commercial 1.0
Look what I want to sell you!



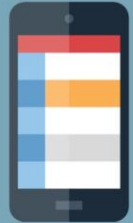
2 Pivot *from* Commercials *to* Content

Content

Look how great we make you!
(Educate - Entertain - Inspire)



Commercial 2.0
Look how great we are!
(the “humble-brag”)



Commercial 1.0
Look what I want to sell you!



3 Pivot

3 Pivot *from* Impressive *to* Relatable

3 Pivot *from* Impressive *to* Relatable

Compliance sanitized,
formal sales pieces

3 Pivot
from
Impressive
to
Relatable

Relatable content that
happens to be
compliant



Compliance sanitized,
formal sales pieces

3 PIVOTS:

- 1 Sales Culture *to* Marketing Culture
- 2 Commercials *to* Content
- 3 Impressive *to* Relatable

*“Meet them
where
they’re at.”*





PACIFIC
ADVISORS®

3 Pivots *for* Millennials (*and Gen-Z*)

- Eric McDermott





PACIFIC ADVISORS®

A Good Life for the Rest of Your Life

This material is intended for general public use. By providing this content, Park Avenue Securities LLC is not undertaking to provide investment advice or a recommendation for any specific individual or situation, or to otherwise act in a fiduciary capacity. Please contact a financial representative for guidance and information that is specific to your individual situation. All charts are for illustrative purposes and are not intended to suggest a particular course of action or represent the performance of any particular financial product or security.

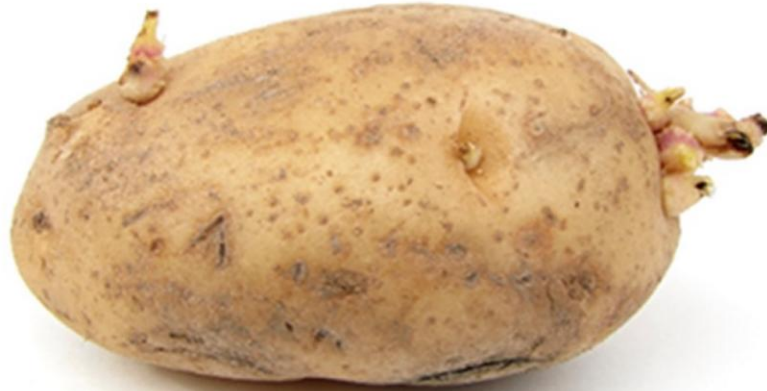
Eric McDermott is a Registered Principal and Financial Advisor of Park Avenue Securities LLC (PAS). OSJ: 2875 Michelle Drive, Suite 110, IRVINE CA, 92606, 909-399-1100. Securities products and advisory services offered through PAS, member FINRA, SIPC. General Agent of The Guardian Life Insurance Company of America® (Guardian), New York, NY. PAS is a wholly owned subsidiary of Guardian. Pacific Advisors, LLC is not an affiliate or subsidiary of PAS or Guardian. Pacific Advisors, LLC is not registered in any state or with the U.S. Securities and Exchange Commission as a Registered Investment Advisor. Insurance products offered through One Pacific Financial & Insurance Solutions LLC, DBA of Pacific Advisors LLC. Pacific Advisors LLC is not registered in any state or with the U.S. Securities and Exchange Commission as a Registered Investment Advisor. CA Insurance License #0G88182. 8260442.1 Exp. 8/25



funmeetsfinancial



IF THIS CAN BECOME VODKA



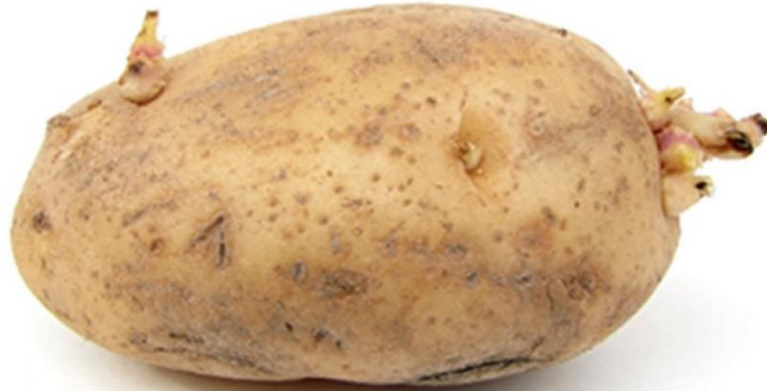
YOU CAN BECOME FINANCIALLY
ORGANIZED



funmeetsfinancial



IF THIS CAN BECOME VODKA



YOU CAN BECOME FINANCIALLY
ORGANIZED



funmeetsfinancial



Pros and cons of making a budget

Pros: budget

Cons: making

