

July 29, 2025

Next in Line Campaign

BALTIMORE

BIRMINGHAM

CINCINNATI

NEW YORK

PHILADELPHIA

SAN FRANCISCO

VERO BEACH

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I. Campaign Overview

Important Statistics

Survey population spans Gen Z and Millennial Demographics

\$68 Trillion

Baby boomers are set to pass more than \$68 trillion on to their children over the next two decades. This is the largest intergenerational wealth transfer in history.

90%

90% of heirs believe that it would be of value to meet their parents' financial advisor.

50%

Only 50% of heirs have ever met their parents' financial advisors.

20%

Only 20% of heirs currently work with their parents' financial advisor.

Campaign Mission

What We're Here to Do: Increase brand awareness and **position 1919** as a **trusted partner** for the **next generation** of our clients. We want to develop the same trusted relationship with the current clients we have with their children.

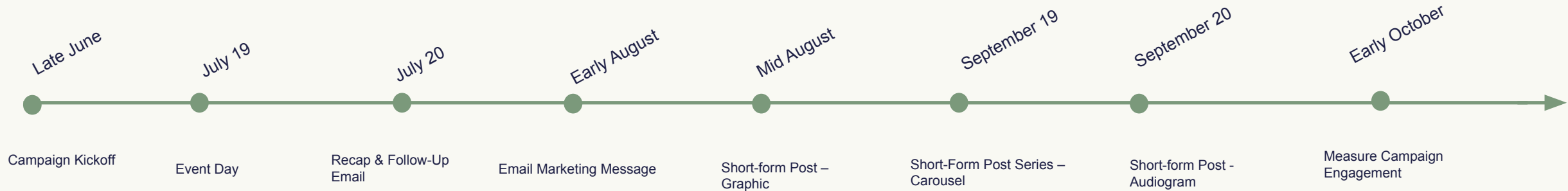
How We'll Do It:

- **Cultivate lasting relationships** with our **current clients** through consistent value and engagement
- Share content that resonates with **new audiences** and reflects their goals, values, and aspirations
- Extend our reach into **untapped markets** with fresh perspectives and meaningful connections

Why It Matters: To ensure finances and opportunities remain aligned with 1919's values—and continue to grow under our stewardship.

Timeline of Events: Summer 2026

The “next-gen” effort is ongoing. Regular content/event cadence is required in order to develop next-gen relationships.



Strategy

Multi-Channel Momentum

A staggered rollout across email, social media, and in-person events ensures sustained visibility. Each phase builds on the last—events spark interest, emails and content deepen engagement.

Content Cadence Supports Learning

Release posts on a regular cadence as it gives the audience time to absorb and reflect. It mirrors how younger investors prefer to learn—bite-sized, relatable, and spaced out.

Event Timing Sparks Relationships

Hosting the event at the start of the campaign helps introduce our brand to the target audience, creating an opportunity to grow our email list. This early engagement makes our content more compelling, as attendees will already have a sense of familiarity with the company.

Target Audience

Next Generation of Wealth

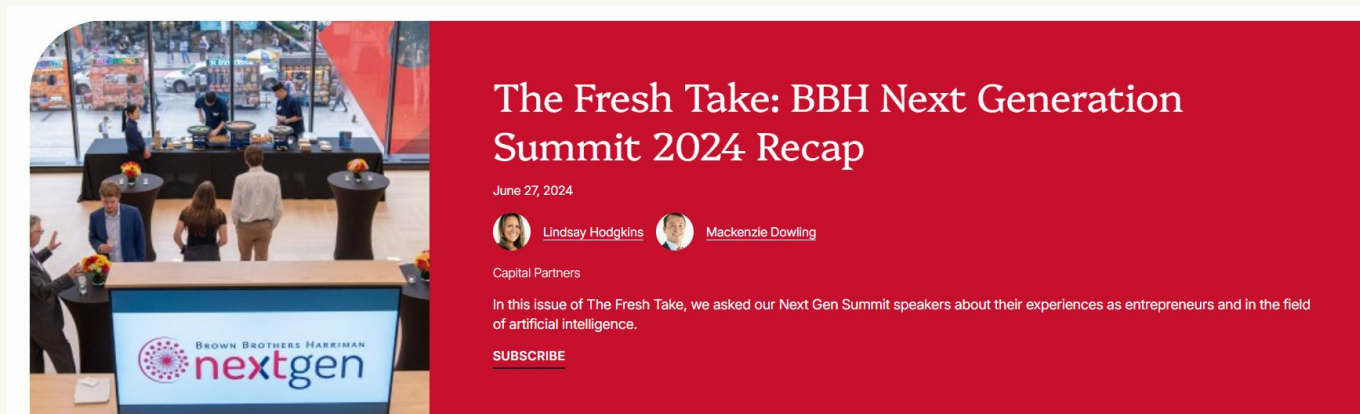
We are targeting HNWIIs aged 25 to 40 who are:

- Non-1919-affiliated young professionals forging independent financial paths
- 1919 clients' family members seeking modern, strategic financial guidance
- Heirs and beneficiaries of generational wealth

Example Persona:

Emily, Sally 1919's daughter is now a seasoned orthopedic surgeon- ten years post-medical school, managing a demanding career alongside growing financial responsibilities. Her husband, Nate, works in tech and recently received equity in a fast-scaling startup. Together, they represent a new wave of wealth: educated, financially empowered, and actively shaping their future. While Emily benefits from her family's legacy with 1919, she and Nate are building a new one- seeking thoughtful, personalized guidance to navigate complex decisions around equity compensation, asset growth, and long-term planning. By cultivating relationships like theirs, we position 1919 as the firm of choice for the next generation- ensuring legacy continuity while expanding our reach to dynamic, high-potential households.

Competitor Analysis



Citizens Private Bank
9,799 followers
8mo • Edited •

+ Follow ...

It was an exciting time at our Inaugural NextGen Finance Conference for 2024!

It was a great two days at the Chaminade Resort in Santa Cruz, filled with panel discussions, and speakers around topics like building wealth and capital strategy. The amazing group of rising professionals in the PE and VC space also found time for networking and team building as well.

Thank you to our NextGen Advisory board for providing their insight and forward-thinking to help curate content for this conference. Also, thank you to our NextGen Leadership Team, [Amy Duong-Jafarpour](#), [Kim Whittall](#), [Meggie Ramirez](#), [Ryan Palsha](#), [CFA](#), and [Matthew Reader](#) for helping put together such a wonderful experience!

A special thank you to our sponsors as well, for helping make this all possible! [Troutman Pepper](#), [Insperity](#), [EY](#), [Goodwin](#), [Flow \(Acquired by Apex Group\)](#).



Morgan Stanley

PRIVATE WEALTH MANAGEMENT

Next Generation
of Leaders

YOUR PURPOSE. YOUR PATH.

BANK OF AMERICA

PRIVATE BANK

The Next Gen Summit 2023:
Helping the Next Generation Align
Passion, Purpose and Prosperity

II. Event

About the Event

Mix & Mingle: The Next Gen Client Experience

- 40 clients' children (including plus ones) in attendance
 - Aged 25-40
- Expert mixologist crafting four signature cocktails and mocktails
- A 1919 team member at each table for personalized engagement
- Interactive, enjoyable experience designed to foster connection
- Curated light bites served during the cocktail hour
- Event will take place in NYC, but will be scaled to other major cities



Goal: Allow clients' children to become familiarized with their parents' financial advisor

MIX & MINGLE THE NEXT GEN CLIENT EXPERIENCE



Sip, savor, and socialize at an evening of
specialty cocktails crafted by expert
mixologists, light bites, and lively
mingling

SEPTEMBER 19, 2025
6:00 - 8:00 PM

Dear Irving on Hudson Rooftop Bar
310 W 40th Street, New York
NY 10018

PLEASE RSVP TO EVENTS@1919IC.COM
BY WEDNESDAY, JULY 3RD

Hi there,

Thank you so much for joining us at *Mix & Mingle, The Next Gen Client Experience* – we loved having you there!

We've gathered all the best moments from the event, and we'd love for you to relive them.

Click the following link to access the photo gallery: [Event Photos](#)

Feel free to download, share, and tag us if you post on social media – we'd love to see your favorite moments!

Also, if you haven't already, be sure to join our [mailing list](#) to stay in the loop for future events, updates, and special content.

Thanks again for being apart of something special. We hope to see you at our upcoming events soon!

About 1919 Investment Counsel: 1919 Investment Counsel is a registered investment advisor. Its mission for more than 100 years has been to provide investment counsel and insight that helps families, individuals, and institutions achieve their financial goals. The firm is headquartered in Baltimore and has offices across the country in Birmingham, Cincinnati, New York, Philadelphia, San Francisco, and Vero Beach. 1919 Investment Counsel seeks to consistently deliver an extraordinary client experience through its independent thinking, expertise, and personalized service. To learn more, please visit our website at 1919ic.com.



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[Unsubscribe](#)

Post- Event Success

Mix & Mingle: The Next Gen Client Experience

Goal: To nurture relationships; connection does not need to be immediate

- What Will Be Measured:
 - Meetings with advisors
 - Post event inquiries from COI's looking to schedule a meetings
 - New additions to the marketing mailing list.
- Results are not easily quantifiable (we want the kids to know where to start when they inherit the money)
- Soft approach (more fun, less educational) □ right now, we want to build brand awareness

III. Email Marketing Campaign

Sample Email

Will be Sent to Both Clients and Next Gen Clients

Email Marketing Campaign Goals

Cast a Wide Net

Show our current clients that we are a great resource
for the next generation

Parent to Child Communication

Encourage our clients to have conversations about
finances with their children

Advisor to Child Communication

Show them that we are prepared to have
these conversations with their children

Hi there,

At [1919 Investment Counsel](#), our work has always been about more than managing wealth, it's about helping you shape the future you envision.

As your family grows and evolves, so do the questions and opportunities that come with it. Many of our clients are beginning to involve the next generation in financial conversations, and we're here to support that transition with the same care, insight, and discretion you've come to expect from us.

Whether it's navigating early career decisions, understanding investment fundamentals, or thinking about long-term planning, we're a resource your children can turn to as they begin to define their own financial paths.

In the weeks ahead, we'll be highlighting perspectives on topics that are increasingly relevant to younger investors, from long-term planning to navigating major financial experiences. These insights reflect the kinds of conversations we're having more often with the next generation.

We invite you to follow along on our [LinkedIn](#) as we continue to explore these themes. It's part of our ongoing commitment to being a thoughtful, steady resource, today and for what's next.

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IV. Content

Short Form Post– Graphic

What I learned From... My First Credit Card



"The key lesson for me was that consistency matters more than spending big. I also adopted the mindset of treating my credit card like a debit card: if I couldn't pay it off right away, I didn't swipe. Once that habit formed, it became much easier to stay on track and in control of my spending."

Kat Weber
Marketing Associate

#WhatILearnedFrom My First Credit Card

Sometimes the smallest financial habits can have the biggest long-term impact.

Marketing Associate Kat Weber shares how her first credit card helped her build smart spending habits that paid off down the road:

"My first credit card taught me the power of building credit early. I used it for gas and groceries, paid it off in full each month, and watched my credit score grow. It felt like a small step at the time, but it opened doors later, like getting approved for my first apartment! The key lesson for me was that consistency matters more than spending big. I also adopted the mindset of treating my credit card like a debit card: if I couldn't pay it off right away, I didn't swipe. Once that habit formed, it became much easier to stay on track and in control of my spending."

— Kat Weber
Marketing Associate

#FinancialLiteracy #CreditBuilding #SmartSpending #1919InvestmentCounsel
#MoneyHabits #WhatILearnedFrom

Short Form Post- Carousel



What I learned From... My First Investment

Start Anyway and Start From Curiosity

Lu Han
Principal, Senior Client Advisor

Reshma Ballie McGowan
Managing Director, Chief Compliance Officer



What Was Your First Investment?

"My first investment was a certificate of deposit that my mom made me put \$50 into each week."

Reshma Ballie McGowan
Managing Director, Chief Compliance Officer

"My first investment was in my company's 401(K) plan, which I opened and funded as soon as I could."

Lu Han
Principal, Senior Client Advisor



Short Form Post- Carousel



What Did Your First Investment Teach You ?

"This is the lesson I hope to learn and relearn, and pass along to other investors. You will not get it exactly right. You will never time the market perfectly when investing. But make a plan, set aside enough for an emergency, then start anyway, learn as you go.

Lu Han
Principal, Senior Client Advisor



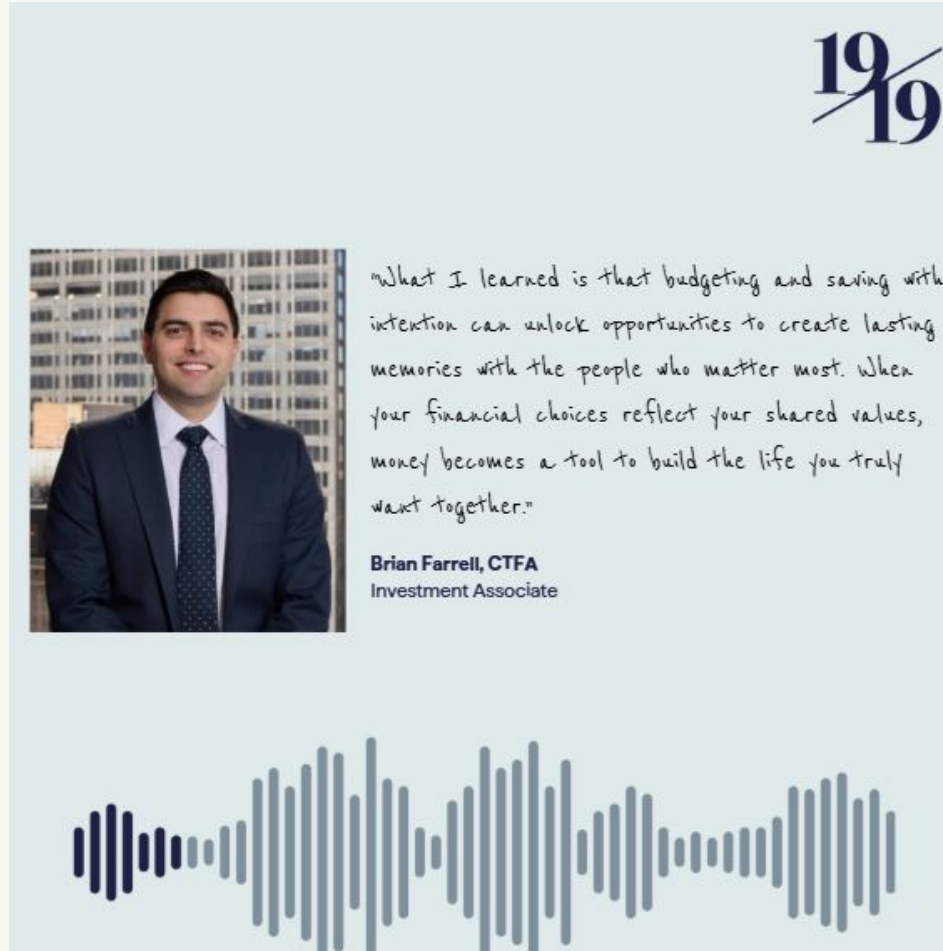
What Advice Would You Give to Someone Just Starting to Invest?

"Just start. Start small. Start from curiosity. Focus on patience and the learning journey, and not the dollar amount."

Reshma Ballie McGowan
Managing Director, Chief Compliance Officer



Short Form Post- Audiogram



19/19



"What I learned is that budgeting and saving with intention can unlock opportunities to create lasting memories with the people who matter most. When your financial choices reflect your shared values, money becomes a tool to build the life you truly want together."

Brian Farrell, CTFA
Investment Associate



#WhatILearnedFrom My First Big Purchase

For many, the first major financial decision isn't just about money—it's about values, priorities, and the people cared about most.

Investment Associate Brian Farrell, CTFA reflects on what he learned from planning and hosting his wedding.

#FinancialWellness #MoneyMindset #BudgetingWithPurpose
#1919InvestmentCounsel #LifeLessons #PersonalFinance

Diversity in Content to be Posted

Mini Email Drip Campaigns: Deliver financial tips or market insights in three-part emails—perfect for nurturing engagement outside social media

New Carousel Post Series (LinkedIn): Break down financial concepts step-by-step. Each slide can be a bite-sized insight (e.g., "What's a Roth IRA really doing for your future?").

Mini Case Studies or Success Stories (LinkedIn/Blog): Showcase a young investor's journey or a financial win from one of your workshops. Relatable storytelling builds trust (person remains anonymous).

Quote Breakdown Posts (LinkedIn): Take iconic finance quotes and decode them: What did Warren Buffett mean? How does it apply now?

LinkedIn Paid Post Promotions

Goal: Brand Awareness

Locations:

- Regionally around 1919 office's

Budget:

- \$5,000 for 30 days

Attributes:

- Seniorities:
 - C-Suite, Director, Owner, Partner, or VP
- Titles:
 - Managing Director or Director
- Interests
 - Financial Investing and/or Philanthropy

LinkedIn Paid Post Promotions

Forecasted Results for \$5,000

1-Day

Forecasted results ⓘ ⚙

Target audience size

3,300,000+

[Show segments](#)

1-day

1-day spend

\$120.00 - \$235.00

1-day reach **Key Result**

40,000 - 170,000

1-day cost per 1,000 member accounts reached

\$2.52 - \$2.97

1-day average frequency

1.0 - 1.4

7-Day

Forecasted results ⓘ ⚙

Target audience size

3,300,000+

[Show segments](#)

7-day

7-day spend

\$660.00 - \$1,645.00

7-day reach **Key Result**

220,000 - 890,000

7-day cost per 1,000 member accounts reached

\$2.54 - \$2.98

7-day average frequency

1.0 - 1.4

30-Day

Forecasted results ⓘ ⚙

Target audience size

3,300,000+

[Show segments](#)

30-day

30-day spend

\$2,000.00 - \$4,999.00

30-day reach **Key Result**

670,000 - 2,400,000

30-day cost per 1,000 member accounts reached

\$2.53 - \$2.98

30-day average frequency

1.0 - 1.4

LinkedIn Post Promotions

Pre-Promotion Results:

	Impressions (total)	Clicks (total)	Reactions (total)	Comments (total)	Repost (total)	Engagement Rate	Total Page Views
Day of Post	700	20	23	2	6	0.5	20
Week After Post	1,300	80	52	5	11	0.6	74
Month After Post	2,000	100	104	7	15	0.4	96

Results After \$5,000 Promotion Campaign:

	Impressions (total)	Clicks (total)	Reactions (total)	Comments (total)	Repost (total)	Engagement Rate	Total Page Views
Day of Post	100,000	600-1000	170	20	10	0.5	30
Week After Post	450,000	2700-4500	720	90	60	0.8	135
Month After Post	850,000	5100-8500	1,360	180	120	1.2	255

V. Closing

Insights & Recommendations

What We Learned:

- How to align content, events, and digital platforms for a cohesive and hopefully a successful campaign
- Content timing is important – ensure series are posted consistently
- 71 % of consumers expected companies to deliver personalized interactions, so personalization is key in making meaningful and successful connections

Recommendations & Takeaways:

- Focus on building authentic relationships with clients' children
 - Interactions can be less educational and more social
- Scale the event model across different offices and keep next gen events consistent
- Consider adding a “Next Gen” team, like W&W to keep these events and connections consistent (yearly or quarterly)

Thank You!

Questions?

