

The Future of Advice: Remarks from Three Elite Advisors

During the 2025 PLAN Forum, three professional advisors took the stage to share how they engage clients effectively. But none was a financial professional – instead, the audience heard from a wedding planner, a luxury travel advisor, and an executive at a concierge medical practice. What did these speakers reveal about the future of advice?



I. Membership has its own value.

Subscribers to our practice don't just pay for access to services; they also belong to a group that shares the same values about care and wellness. Calling themselves a member of our organization lets them feel that they reflect those values.

Are there ways you can make your clients feel like members of your practice? Does your practice express values that speak to how your clients might want to see themselves?



II. Personal experience is a foundation for knowledge & trust.

I make sure to travel multiple times a year to keep myself up to date on the experience of traveling. Because I bill myself as an expert in multigenerational travel, I make sure to travel with my own family – spouse, kids, and grandkids – so I can have that lived experience.

What personal experiences do you use to connect with clients and demonstrate knowledge? If you specialize in clients with specific needs or characteristics, how do you shape your profile to cater to that specialty?



III. Generative AI has surprising uses.

I use generative AI to easily craft worksheets to help my clients think through their planning. Using AI, I can personalize the materials that I give them on the fly. I also use AI to help me write emails to clients quickly, especially when I need to phrase myself diplomatically.

Have you experimented with free generative AI tools like ChatGPT and Claude to discover some of their capabilities and limitations?



IV. Next-gen clients are different from their parents and grandparents.

With exposure to new technologies, social media, and on-demand experiences, younger clients tend to have shorter attention spans, higher expectations, and are more likely to come into a meeting having conducted their own research.

Have you adapted your approach for prospective younger clients? Are your communication strategies well-suited to an audience that has been brought up on social media?



Fallon Carter
Founder & Creative Director
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Fallon Carter is a top destination event producer, media host, and travel expert, featured in Harper's Bazaar, Vogue, and BRIDES as one of the Top Wedding Planners in the world.



Stacy Kennedy
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Stacy Kennedy is a Registered Dietician, Licensed Nutritionist, fitness expert, and educator with over 25 years of experience helping individuals, companies, and professionals with the latest discoveries in nutrition science



Shari Shocket
Travel Designer
Largay Travel

Shari Shocket has over 30 years of experience in luxury travel and specializes in creating personalized itineraries that cater to clients' unique preferences