

## Recruitment Strategy Checklist to Attract Gen Z Advisors

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5 key actions and suggested steps, plus self-assessment questions to help you reflect and improve your process.

### 1. Define your agency's brand

*Gen Z values purpose, impact and inclusivity, so ...*

- ✓ Clearly communicate your agency's mission, values and long-term impact.
- ✓ Highlight how your work helps clients during critical life moments and brings meaning to advisors' careers.
- ✓ Share stories of young advisors who found success quickly and built stable, rewarding careers.
- ✓ Ensure your social media, website and platforms like LinkedIn and Glassdoor reflect a flexible, inclusive and forward-thinking agency.

**Ask yourself:**

- *Does our branding clearly express why our agency's work matters?*
- *Are we telling Gen Z-friendly success stories across our channels?*
- *Do our online ratings and reviews support the image we want to project?*

### 2. Articulate that brand in a standout job posting

*Gen Z wants meaningful careers with growth and stability, so ...*

- ✓ Use language that's clear, friendly and free of jargon.
- ✓ Emphasize mission, impact and the real-life outcomes of the job.
- ✓ Include growth potential, income progression and training support.
- ✓ Prepare short videos or testimonials from younger advisors sharing why they chose this career.

**Ask yourself:**

- *What language in our job posting can we cut because it sounds generic?*

- *Are we clearly connecting this role to long-term impact and purpose?*
- *Are we showcasing flexibility, learning and inclusion in tangible ways?*

### 3. Make a strong connection before the interview

*Gen Z moves fast and expects a modern experience, so ...*

- ✓ Optimize your application process for mobile devices and eliminate unnecessary steps.
- ✓ Communicate early — offer virtual meet-and-greets or informal chats before the formal interview.
- ✓ Outline what onboarding and team support looks like.

***Ask yourself:***

- *Does the candidate's first touchpoint with us feel welcoming and modern?*
- *Are we using digital tools to preview our culture and daily work life?*
- *Have we simplified our application and responded quickly?*

### 4. Conduct a Gen Z-friendly interview

*Gen Z craves transparency and authentic conversations, so ...*

- ✓ Go beyond job duties — emphasize advisor-client relationships.
- ✓ Explain learning opportunities and mentoring systems, including reverse mentoring.
- ✓ Invite discussion on team culture and professional development.

***Ask yourself:***

- *Are we treating interviews like conversations, not interrogations?*
- *Are we talking about clear growth pathways, not just tasks?*
- *Are we helping candidates imagine the emotional value of helping clients?*

### 5. Strengthen post-interview engagement

*Gen Z wants to feel connected and challenged, so ...*

- ✓ Follow up within 24–48 hours with a personalized note.
- ✓ Clearly explain what comes next and offer opportunities to stay connected.
- ✓ Invite top candidates to shadow an advisor, attend an event or review your support resources.

***Ask yourself:***

- *How are we continuing the conversation with strong candidates?*
- *Are we helping them picture themselves as independent business owners?*
- *Are we offering content or experiences to keep them engaged after the interview?*