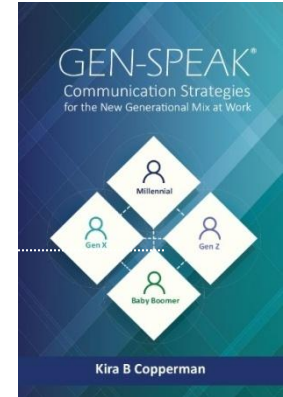


Cross Generation Strategies for Cost Segregation Professionals



Presented by: KIRA B COPPERMAN



Three Crucial Reasons Organizations are Addressing Generational Issues

Competition for talent is escalating

Four different generations are working side-by-side

Productivity and Business Results linked to employee engagement



Some challenges I heard after speaking to some people in your industry

- Some employees prefer remote, some in person
- Some don't want to travel as much even though it is part of the job
- Training younger people is a common need
- Workplace expectations regarding hours, promotions, pay, etc. are not aligned
- The apprenticeship model in cost segregation is shifting
- Technology has changed the way the work gets done
- Turnover is a concern





What is a Generation?

A generation is a group of people who because of shared age, experiences, and environment, also share attitudes, values, ideas, styles, and challenges

BABY BOOMERS

Born between 1946-1964 ≈ 61-79 years old

Mottos	“Anything is possible”; “Fix what isn’t working”; “Live to work”
World Events & Influences	Civil Rights movement; Woodstock; Vietnam war; Kent State; Watergate; Birth of television—vast communication; job availability—but 80 million strong meant competition for them
Icons/Role Models	Martin Luther King, JFK, Rosa Parks, Gloria Steinem, Captain Kirk, The Beatles
Attributes	Optimistic; Collegial style; Workaholic; Social reformers; Competitive; Goal-centric
Workplace Expectations	To be in charge; Rewarded with money and promotions; Given respect with full attention; Meetings to make decisions; Kept in the loop; That everyone work as hard and long as they do; Face to face interactions

BABY BOOMERS

Born between 1946-1964 ≈ 61-79 years old

Do



Value their experience, Communicate face to face, Build a relationship that goes beyond work

Don't



Ignore their contributions or knowledge, Tell them—ask them, Solve problems via email or chat

Likes



Work to come first, People to work in the office, “Can do” attitude, Competitiveness

Dislikes



Laziness, Improper business etiquette, Others not giving their full attention

Baby Boomer Client Suggestions

Face to face
meetings

Develop a
relationship that
goes beyond
professional

Provide the feeling
you are handling
their situation as if
it were your own

Clearly explain the
value you are
providing

They work 24/7 so
they might expect
you to do the same

They might be
demanding and
inquisitive

GENERATION X

Born between 1965-1980 ≈ 45-60 years old

Mottos	“Trust yourself”, “Work to live”
World Events & Influences	Every major American institution called into question: presidency, military, organized religion, corporate America; AIDS epidemic; Gulf war; Divorce rate tripled during birth years of Gen X
Icons/Role Models	The emergence of the “anti-hero” and identification with the underdog mentality; MTV, Bill Gates, Reality Bites, Kurt Cobain
Attributes	Independent; Self-command style; Suspicious of authority; Skeptical; The “latchkey generation”
Workplace Expectations	Autonomy and empowerment; Work/life balance options; Quick decision making; Trust is earned, not given

GENERATION X

Born between 1965-1980 ≈ 45-60 years old

Do



Communicate directly, Act consistently to earn their trust, Allow to multi-task and work independently

Don't



Expect optimism, Talk around issues, Be too rigid, Overpromise

Likes



Freedom, Up to date technology, Efficiency, Work/life balance

Dislikes



Too much collaboration, Political red tape, Hype

Gen X Client Suggestions

They might think you care more about the money you make from them than them

They want complete transparency and want shared decision making

Do what you say you're going to do to build trust

They tend to be skeptical and informed so if they sense they can't trust you, they will go elsewhere

They base their view of you on their most recent experience, not their overall experience

Millennials/Gen Y

Born 1981-1995 ≈ 30-44 years old

Mottos	“Work should be fun and meaningful”; “My opinion matters”
World Events & Influences	Proliferation of technology; Information and communication; Highly scheduled childhoods, Heavily involved parents; Student-centric education
Icons/Role Models	Mark Zuckerberg, Barack Obama, Lady Gaga, Taylor Swift, Beyoncé, Steve Jobs
Attributes	Hopeful; Participative style; Determined; Actively engaged with social media
Workplace Expectations	Professional development training; Frequent positive or opportunistic feedback; Mentorship; Explanations for why and how things are done; The latest technology; Positive interactions with co-workers; Clear career path

Millennials/Gen Y

Born 1981-1995 ≈ 30-44 years old

Do



Answer their questions, Give positive or opportunistic feedback, Listen to their input, Support professional development opportunities

Don't



Ignore their security, Focus on time versus results, Forget to explain "why"

Likes



The latest technology, To ask questions, Being included, Companies that give back, Advocating for themselves, Career growth

Dislikes



Negativity, Anything slow, Boredom, Status quo

Millennial Client Suggestions

Allow them to give input
and decide
collaboratively

They expect everything
to be done digitally –
show how you use the
latest technology

Millennials expect
speed, ease and self-
service options

Chat rooms, business
review sites, etc. will
assist them in choosing
their cost segregation
professional

They want to see that
you give back to the
community

Gen Z Background

Grew up post 9/11 during recession

Socio-economic environment marked by chaos, uncertainty, volatility and complexity

Determined to “make a difference” and “make an impact”

Eager for knowledge and use social media and the internet as resources

Professional development has been impacted by the pandemic

Higher rates of anxiety and depression

Gen Z Born

1996 - 2006 ≈ 19-29 years old

Motto	“People should be able to be themselves”; FOMO; Purpose Driven
World Events & Influences	2008 recession; Divisive political climate; Expansion of news sources: School shootings and terrorism threat
Icons/Role Models	Climate activists; Malala Yousafzai; RBG; Billie Eilish
Attributes	Realists; Social activists; Team players; Digitally savvy; Entrepreneurial; Want to work; Cautious about money
Workplace Expectations	Flexible work environment; Role and responsibility clarity; A company that supports individual liberties; Secure job with fair pay; The latest technology; Communication with senior leaders

Gen Z Born

1996 - 2006 ≈ 19-29 years old

Do



Provide microlearning, Show social responsibility and inclusivity, Create opportunities for teamwork, Provide clear direction

Don't



Ignore their mental health concerns, Take too long to respond, Expect excitement for RTO full time

Likes



Workplace flexibility, Stable companies, Connection with leaders, Learning opportunities, Down time

Dislikes



People who don't DWTSTWD, Perceived biases, Words without action

**The
Titanium
Rule**

Do unto others keeping their preferences in mind

Tips for Working Across Generations

Check Your
Assumptions - CYA

Be aware that not
everyone thinks
and acts the same
way you do

Maintain openness
to other
perspectives

Meet people
where they are at
vs where you think
they “should” be

Ask questions
before judging

Assume good
intent

Baby Boomer Engagement



Gen X Engagement



Gen Y/Millennial Engagement



Gen Z Engagement





Thank You

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