
PRESS RELEASE

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Invesco launches star-powered adviser platform to meet huge soft skills demand

- Invesco finds outsized demand for soft skills training, which currently accounts for less than 10% of financial advisers' Continuous Professional Development (CPD)
- In response, it has launched 'Invesco Intelligence Plus', a comprehensive platform for the modern adviser focusing on soft skills, practice management and investment skills
- Powered by world-leading experts, such as rugby legend Sir Clive Woodward, it builds on Invesco's highly regarded Investment Intelligence Seminars, used by 4,000 advisers annually for more than 25 years
- The launch is part of Invesco's ongoing commitment to supporting advisers and follows a pipeline of innovative investment solutions it has created to help advisers' meet evolving client needs.

London 1 July 2024 - Invesco, one of the world's leading asset managers, today announces the launch of [Invesco Intelligence Plus](#), a comprehensive CPD-accredited platform that leverages the star power of world-leading experts to deliver soft skills lessons to advisers to address a significant unmet need.

The platform is being launched in an environment where financial advisers' biggest challenges – according to new research from Invesco¹ – are increasing regulation and engaging the next generation of clients. Advisers are turning to outsourced investment solutions to save valuable time, which they can then devote to addressing these challenges. However, Invesco also found substantial demand for more soft skills training, which advisers believe is central to effectively engaging clients and meeting their evolving needs.

Currently, advisers are required to complete 35 hours of CPD on technical skills per year, with no set requirement for soft skills training. That is despite Invesco finding that the top three skills advisers value as most important are all soft skills; listening skills (cited by 75%), communication skills (65%) and empathy (63%) were all ranked by advisers above financial knowledge (51%).

Invesco surveyed 200 advisers and found that three quarters (73%) do less than 10% of their training on soft skills and, of these, a quarter (23%) do no soft skills training. This is despite 96% of advisers agreeing that soft skills are important for their role and more than half (52%) ranking a greater focus on soft skills as the improvement they would most like to see to CPD training.

The new Invesco Intelligence Plus platform has been built by experts and unites the three core skills that are critical to supporting the role of the modern adviser:

- **Emotional Intelligence:** Lessons from world-leading experts from outside the world of investment. The platform launches with a lesson on the '*Art of Communication*' from England Rugby World Cup winning manager Sir Clive Woodward, and a lesson on the '*Art of Listening*' from Julian Treasure, sound expert and author, whose TED Talks have been viewed more than 150 million times.
- **Practice Intelligence:** Lessons from Invesco Global Consulting, the research-based consultancy dedicated to financial professionals. Modules available at launch include '*Golden Hour*', taught by Invesco Director of Consulting Services Brett Van Bortel, focusing on how advisers can retain their biggest clients, and '*Preferrals*', with Invesco Managing Director of Consulting Development & Delivery Gary DeMoss, covering how advisers generate referrals from their existing client base.
- **Investment Intelligence:** Lessons from Invesco's renowned 'Investment Intelligence' training programme, which has been delivered for over 25 years to more than 4,000 advisers around the UK each year. Neal Bailey, presenter of the Investment Intelligence Seminars and Ben Gutteridge, Invesco's Director of Model Portfolio Services, provide their financial markets and asset allocation outlooks.

Invesco will continue to develop the Intelligence Plus platform over time, adding new modules from external and internal experts across all three core skills areas at regular intervals through the rest of the year and beyond. The launch is the latest milestone in Invesco's focus on delivering a broad range of innovative solutions for financial advisers, accompanied by high quality service and support.

Speaking in his lesson for Invesco Intelligence Plus on the *Art of Communication*, Sir Clive Woodward, England Rugby World Cup winning manager, said:

"As a financial adviser, it's critical to establish trust, foster long-term client relationships, and help your clients navigate their financial journey successfully. Communicating effectively can sometimes feel straightforward particularly when things are going well, but when markets are down, portfolios are underperforming, and clients are asking challenging questions it's much harder to maintain a strong client relationship. That's when great communication and a winning mindset really matters."

Kate Dwyer, Head of UK Distribution, Invesco said: “The traditional financial adviser relationship with asset managers has evolved rapidly, and where advisers previously used a large number of managers for their investment needs, they are now prioritising as few as one or two for a range of comprehensive investment solutions. For managers to be a true ‘partner of choice’, they need to provide the service and support that sits around first-class investment solutions. The Invesco Intelligence Plus platform is the natural next step for us as we build upon our high-quality offering to continue to work with advisers, helping them to deliver the best possible services and outcomes for their clients – whatever their needs.”

Owen Thomas, Head of UK Wholesale, Invesco said: “Advisers choose outsourced solutions because they can draw upon external investment expertise while saving time that can be better spent serving clients. But to capitalise on that time, we found advisers want support with the skills they need to best engage and communicate with new and existing clients, build trust, and manage expectations and emotions.

“We have launched Intelligence Plus to address a significant unmet need, supporting advisers to excel in their role by equipping them with the skills they want to meet modern client demands. In the same way we provide a comprehensive service and support alongside our investment solutions for advisers, we are taking the next step to provide advisers with the soft skills lessons they want to help them do their jobs to the best of their abilities – finding new and improved ways to strengthen relationships with clients.”

In January 2024, Invesco launched a Discretionary Model Portfolio Service for financial advisers and wealth managers. This was followed in June with the announcement of a strategic partnership with retirement specialist Just Group, to develop a new retirement solution for advised clients to help meet the changing needs of those approaching or already at retirement. June also saw the launch of the Invesco Summit Income Fund (UK), a fund of funds designed to help UK financial advisers meet the evolving needs of clients seeking reliable income streams, particularly during retirement.

Invesco’s suite of solutions for advisers also includes the Summit Growth and Responsible ranges, and its Advisory Model Portfolio Service. All are managed by a division of Invesco Multi Asset Strategies, a team of over 800 investment professionals worldwide that currently manages over £128bn in client assets.

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¹Research comprised an online survey of 200 UK advisers, conducted by Opinium in March 2024.

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About the 'Art of Communication' – a lesson from Sir Clive Woodward:

Sir Clive Woodward, England Rugby World Cup winning manager, gives advisers the tools to transform the way they communicate with clients, colleagues and prospects. Great communication is at the heart of all great relationships – whether those relationships are in sport or in business – and Sir Clive helps advisers to improve the way they communicate in three stages. Stage one is all about building the winning mindset – the precursor to great communication. Stage two is all about curiosity – and how curiosity is the key to continuous improvement in the way you communicate. And finally, stage 3 is all about pressure – and how pressure can be channelled to help optimise the way you communicate in high stake scenarios.

About the 'Art of Listening' – a lesson from Julian Treasure:

Julian Treasure, sound expert and author, supports advisers to understand what it takes to go beyond just hearing to genuinely listen to what your clients are telling you. Financial advisers add value by enhancing clients' quality of life, which comes from building and nurturing strong, trust-based relationships. Relationships are built on listening, and Julian explores the power of listening, the cost of not listening, how to listen effectively, how to make listening unique and a range of techniques to successfully listen and achieve understanding. The lesson helps advisers to achieve true understanding of their clients' needs and ultimately build trusted long-term relationships.

About Invesco Ltd.

Invesco Ltd. (Ticker NYSE: IVZ) is a global independent investment management firm dedicated to delivering an investment experience that helps people get more out of life. With offices in more than 20 countries, our distinctive investment teams deliver a comprehensive range of active, passive and alternative investment capabilities. For more information, visit invesco.com/corporate.

Investment risks

The value of investments and any income will fluctuate (this may partly be the result of exchange rate fluctuations) and investors may not get back the full amount invested.

Invesco Summit Income Fund (UK)

As one of the key objectives of the product is to provide income, the ongoing charge is taken from capital rather than income. This can erode capital and reduce the potential for capital growth. The product's use of financial derivatives may result in the product being leveraged, that is, the economic exposure created by using a derivative may be greater than the amount invested. The product, therefore, has the potential to lose more than it paid. If a counterparty becomes insolvent this will also result in a loss. The use of certain derivatives may also impair the product's liquidity which may mean the product has to close positions at an unfavourable price. The issuers of the debt securities to which the product is exposed may not always make interest and other payments due to financial difficulties or insolvency. The value of the debt securities may fall due to poor market conditions, such as a decrease in market liquidity, and/or variations in interest rates. These risks increase where the product invests in high yield, or lower credit quality, bonds. The value of the equity securities to which the product is exposed may fall in response to certain events, including the activities and results of the issuer, macroeconomic environment and market condition. The product may be exposed to securities

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For the most up to date information on our funds, please refer to the relevant fund and share class-specific Key Information Documents, the Supplementary Information Document, the financial reports and the Prospectus, which are available using the contact details shown.

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