

# Showtime

Preparing for the spotlight: when it's time to tell your story to prospective clients

## Overview

If you have a great story to tell, then you need to know how to tell it. Whether you rely on a pitchbook, presentation or conversation to win new business, your story needs to be concise, compelling and consistent, and it needs to be told with conviction and skill. "Showtime" is specifically designed to help high-net-worth (HNW) and ultra-high-net-worth (UHNW) advisors refine their stories for prospective affluent investors, institutions and multi-generational families. The key teaching points are based on over 1,700 presentations, with over 80 HNW, UHNW institutional teams, and the largest study ever done on the language of financial services.\*

## Skills to be developed from the presentation

Attendees will be shown:

- How to structure their stories for HNW and UHNW investors
- How to prepare for the unscripted
- How to structure their bios
- How to simplify their investment processes and philosophies
- How to talk about services beyond the portfolio
- Four cornerstones of presenting their stories
- Key words to use and lose

## Based partially on the work of

- Gary DeMoss, Director of Consulting, who has trained thousands of investment professionals on consultative selling and presentation skills
- Jim Morel of JAM Consulting, whose consulting firm specializes in sales and presentation skills
- "Showtime" coaching sessions with HNW, UHNW and institutional teams
- Maslansky + Partners



Gary DeMoss  
Director of Consulting

Gary is Director of Invesco Consulting, a group dedicated to helping advisors get new clients, keep the clients they have, and grow their businesses. Gary serves as a keynote speaker at numerous top industry conferences both in the US and abroad and coaches top advisor teams in the industry.

He was selected from an elite pool to be one of the four "Main Platform" presenters at the prestigious Million Dollar Round Table, where he spoke to an audience of more than 12,000 financial professionals. Gary has co-authored multiple books, including his most recent, *The Language of Trust: Selling Ideas in a World of Skeptics*,\*\* with the goal of helping advisors thrive in an age of client skepticism. Prior to his 30-plus year career in financial services, Gary worked in sales management with Procter and Gamble. He holds a degree in business from Miami University in Oxford, Ohio.

Gary is married and lives in St. Charles, Illinois. He has six adult children who have kept him busy with numerous sports activities over the years. In whatever time is left over, he enjoys boating, skiing in the Rockies, and most other outdoor sports.

\*Source: Invesco Consulting Database 12/31/2001-12/31/2016.

\*\**The Language of Trust: Selling Ideas in a World of Skeptics*, by Michael Maslansky with Scott West, Gary DeMoss and David Saylor (2010), published by Prentice Hall Press.



# Helping select financial professionals with skeptical clients get, keep and grow business with never-before-seen ideas

## Leaders in helping advisors, worldwide

Founded in 1998, I•C is a team of 14 specialists with over 25 programs and 15 books that is seen by over 40,000 advisors each year.\*

\*as of 12/16

## Proprietary, relevant and actionable research

I•C presentations are based on extensive research, streamlined into actionable steps and implementable with I•C Studios follow-up.

## The complete advisor experience

Each presentation is complemented by online video reviews and toolboxes designed to help advisors easily apply the research into their businesses.

## I•C programs, designed to help advisors with...



- Presentation development and delivery
- Value propositions shown to resonate with investors
- Public seminars that fill rooms
- Communication skills
- Retirement strategies... simplified
- Proven referral strategies
- Strategies for gathering assets

*National Wirehouse*  
800-998-4246

*Regional Broker Dealer*  
800-421-0807

*Independent Advisor*  
800-337-4246

*Retirement*  
800-370-1519

*Insurance and Education Sales*  
800-410-4246

*Registered Investment Advisor*  
800-421-4023

*Closed-End Funds*  
800-341-2929

*Global Cash Management*  
800-659-1005, option 2

*Client Services*  
800-959-4246

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"Showtime" is based on our firm's work with Jim Morel of JAM Consulting, Maslansky + Partners, R.A. Prince & Associates, Inc., "The Question Guys" (Bret Nicholaus and Paul Lowrie), John Evans (Screenwriter) and Bob DeRosa (Screenwriter), as well as the books, *The Millionaire's Advisor: High-Touch, High Profit Relationship Strategies of Advisors to the Wealthy*, by Russ Alan Prince and Brett Van Bortel (2003), published by Institutional Investor News, *Wealth Management: The New Business Model for Financial Advisors*, by Russ Alan Prince and Hannah Shaw Grove (2003), published by Penton Media, *RainMaker: Strategic Partnering with Attorneys and Accountants to Create a Pipeline of New Affluent Clients*, by Russ Alan Prince and Brett Van Bortel (2006), published by the National Underwriter Company, *The Top Performer's Guide to Speeches and Presentations*, by Tim Ursiny and Gary DeMoss (2007), published by Sourcebooks, Inc., *StorySelling for Financial Advisors: How Top Producers Sell*, by Scott West and Mitch Anthony (2000), published by Kaplan Publishing. Used with permission. Invesco Distributors, Inc. is not affiliated with Russ Alan Prince, R.A. Prince & Associates, Inc., Jim Morel, JAM Consulting, Maslansky + Partners, "The Question Guys," Hannah Shaw Grove, Tim Ursiny, Mitch Anthony, John Evans or Bob DeRosa.

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This does not constitute a recommendation of any investment strategy or product for a particular investor. Investors should consult a financial professional before making any investment decisions.

The opinions expressed are those of the author and are subject to change without notice. These opinions may differ from those of other Invesco investment professionals.

Founded in 1998, I•C has helped more than 600,900 financial advisors, high-net-worth teams, variable annuity producers, retirement specialists and home office managers get, keep and grow business through our speaking engagements from December 2001-December 2016.

Note: Not all products, materials or services available at all firms. Advisors, please contact your home offices.

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