
403(b)(7) Fact Sheet

What is a 403(b) plan?

A 403(b) plan is a defined contribution plan, available only to public schools and certain tax-exempt organizations. It is one of the most effective ways to help build your retirement savings because it allows you to make contributions through convenient payroll deductions. It also allows you control over the amount contributed and how your savings will be invested.

Speak with your financial professional to develop a savings and investment strategy to support your financial needs and abilities.

Invesco 403(b)(7) program

1. Choose from a wide range of investment options across every major asset class, which includes our suite of target-maturity and target-risk funds.
2. Roth 403(b).
3. Loan feature: \$75 one-time initiation fee.¹
4. Low annual maintenance fee: \$30 per participant.²

Why Invesco for your 403(b)(7)

Invesco is a global asset management firm with decades of experience serving the needs of retirement plan participants and plan sponsors, as well as their advisors. We offer investments across every major asset class, including US and international equity and fixed income portfolios. We also provide innovative asset allocation strategies to help investors pursue specific investment and risk management objectives.

Investor services and support

1. Online account access to view your account at invesco.com/us and access to investment information, market insights and educational resources.
2. Easy to ready quarterly statements
3. Fund exchanges via phone.
4. Invesco Client Services at 800 959 4246 is available to answer investor services and account questions, Monday through Friday from 7:00am to 6:00pm CT.

Invest in your retirement future, by contributing to your 403(b) plan with Invesco today.

To learn more, contact your employer or me.

-
1. Check with your plan sponsor or administrator if loans are permitted in your retirement plan.
 2. The Fee is waived across all retirement account types if the total assets held by the shareholder in any retirement or non-retirement accounts held directly at Invesco, excluding 529 plans, is \$50,000 or greater on the date Fees are assessed.

Before investing, investors should carefully read the prospectus and/or summary prospectus and carefully consider the investment objectives, risks, charges and expenses. For this and more complete information about the fund(s), investors should ask their financial professionals for a prospectus/summary prospectus or visit [invesco.com/fundprospectus](https://www.invesco.com/fundprospectus).

A target date fund identifies a specific time at which investors are expected to begin making withdrawals, e.g., now, 2025, 2030. The principal value of the fund is not guaranteed at any time, including at the target date.

A target risk fund is a type of asset allocation fund that holds a diversified mix of stocks, bonds, and other investments to create a desired risk profile. The fund manager of a target risk fund is responsible for overseeing all the securities owned within the fund to ensure that the level of risk is not greater or less than the fund's target risk exposure.

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.

Diversification does not guarantee a profit or eliminate the risk of loss.

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

The information contained here is not tax advice. Please consult your tax advisor about your particular situation.

All data provided by Invesco unless otherwise noted.