Invesco

Invesco Consulting

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 that is seen by over 40,000 advisors each year.*

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.

*as of 12/17

Invesco Consulting (I•C) has specialized in unique and creative ideas for financial professionals since 1998. Our team of presenters, researchers, graphic artists and support staff is dedicated to helping advisors get, keep and grow business.

Invesco Consulting

Meet the specialists

Scott West

Head of Consulting

Scott oversees one of the largest consulting divisions of its kind in the asset management industry. In this position, he works with and presents to financial advisors across North America.

Scott is a sought-after keynote speaker who brings thirty-plus years of industry experience coupled with a creativity known to educate and entertain. He is a co-author of five books, including *StorySelling for Financial Advisors: How Top Producers Sell*,[*] which was named a "must read" by financial-planning.com, and, most recently, *Defining Conversations: A Little Book About a Big Idea*.[**]

Scott was with Van Kampen Investments prior to its combining with Invesco in 2010. In the 27+ years since he joined the firm, he advanced from field sales to regional sales and finally to national sales positions. In addition, he served as Director of Marketing. Prior to his career in financial services, Scott worked in sales distribution with Procter & Gamble. Scott holds a BA in economics and communications from Wheaton College in Wheaton, Illinois.

Born and raised in Toronto, Canada, Scott is an avid hockey enthusiast. He assumes full credit for his Texas-born wife's newfound love of the sport. Scott is the father of four children and resides in Wheaton, Illinois.

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 32+ 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.

[*] *StorySelling for Financial Advisors: How Top Producers Sell* by Scott West and Mitch Anthony (2000), published by Kaplan Publishing.
[**] *Defining Conversations: A Little Book About a Big Idea* by Scott West and Mitch Anthony (2011), published by InsightsPress.
[***] *The Language of Trust: Selling Ideas in a World of Skeptics* by Michael Maslansky with Scott West, Gary DeMoss, David Saylor (2010), published by Prentice Hall Press.

Brett Van Bortel

Director of Consulting Services

Focuses: COI referral cultivation, HNW retention, advocate referral generation and wealth management business expansion.
21+ years' experience.

Lisa Kueng

Director of Creative Campaigns

Focuses: program development, presenting, advisor coaching, women's programs and retirement issues.
20+ years' experience.

Maura Scherer

Director of Creative Campaigns

Focuses: advisor branding, coaching and presenting.
21+ years' experience.

Thomas Rowley

Director of Retirement and Education Strategies

Focuses: retirement, regulation and legislation.
22+ years' experience.

Rob Kochel

Vice President

Focuses: investor communication strategies, client attraction/retention, financial language research and evolving business practices.
19+ years' experience.

David Saylor

Director of Consulting Campaigns

Focuses: research, program development and coaching.
21+ years' experience.

Jon Vogler

Senior Analyst, Retirement Research

Focuses: retirement-related articles and blogs, reseach and editing, legislative and regulatory analysis.
36+ years' experience.

Brian Anderson

Senior Designer

Focuses: print, PowerPoint, web and animation design.
14+ years' experience.

Don Reese

Video/Digital Designer

Focuses: video, web and digital design.
24+ years' experience.

COI = center of Influence
HNW = high-net-worth

Invesco Consulting Programs

Over 25 research-based programs from which to choose

Presentation development and delivery

Boardroom Presenting
What matters most in winning high-stakes presentations

Showtime
Creating and presenting your story with the goal of winning prospective clients

Final Word 2
Winning the decision

Value propositions shown to resonate with investors

Tell Me More
Creating more clients in 15 words or less

Brand U
Get the attention you deserve

Proven referral strategies

RainMaker
Building strategic partnerships with attorneys and accountants for a pipeline of new, affluent clients

Preferrals
The unmasking of asking

Advocasions
Nothing draws a crowd...like a community

Strategies for gathering assets

NEW FOR 2018/19 **Priceless**
The language of value

Fi•natical Curiosity
It pays to ask

The Kids You Love Next
529: Helping clients impact the next generation

WealthMapping
A system designed to match client problems with financial product solutions

Public seminars that fill rooms

Your Prosperity Picture Public Workshop
A 5-step system designed to help manage your money, design your life and create your future

The New Retirementality Public Workshop
Exit? Or just change lanes?

The Income-ing Age
The economics of retirement distributions

Communication skills

ReDefine Contribution Plans NEW FOR 2018/19
Engaging participants with clarity

Explain Traded Funds NEW FOR 2018/19
Helping clients understand ETFs

The Golden Hour NEW FOR 2018/19
Retention through attention

New Word Order
It's not what you say; it's what people hear

M.A.I.N. Street
The language of risk

The Power of Alternatives
Helping advisors with the language proven to work

StorySelling
Making the unknown known by using the familiar

The New Retirementality FA Keynote
Exit? Or just change lanes?

T.E.A.M. Dynamics
Selling and managing with personality DNA

Boardroom Personalities
Winning high-stakes presentations in boardrooms filled with dissimilar people

The Nine Lives of the Affluent
How the wealthy select, retain and refer their advisors

Your Prosperity Picture FA Keynote
Fresh perspectives designed to create momentum with female clients

Retirement strategies... simplified

2016 CE Webinar Series
Retirement issues for today's advisors

The Changing Retirement Opportunity
Timely retirement updates and strategies

Retirement Insights
What advisors should know about what's next

Process

A results-based process for the complete advisor experience

3 After

- Help reviewing and applying the information with the I•C Studios videos and toolbox
- Assistance from knowledgeable Invesco representatives
- Available additional in-depth research findings

2 During

- Entertaining and relevant keynotes
- Information based on research–not speculation
- Engaging and professional presenters

1 Before

- Help drive attendance with video trailers, invitations and fact cards
- Prep calls to understand the unique needs of the audience
- Logistics calls to assure that everything runs smoothly

invesco.com/ic

e-trailers

3-minute videos that introduce
featured I•C programs

[SHORTS]

15-minute video highlights
of featured I•C programs

I•C Studios

Video reviews and toolboxes
designed to help advisors
learn and apply I•C's
primary research findings

Going beyond the keynotes to help advisors get, keep & grow business

A unique presentation experience

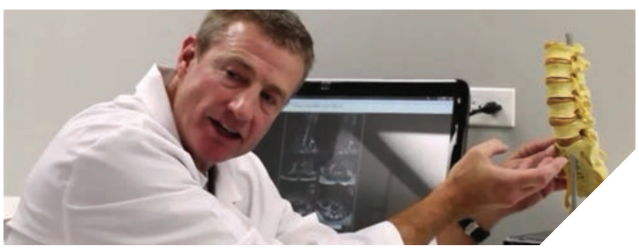
Keynotes filled with thought-provoking ideas, entertaining videos and actionable research

A "heard on the street" video that asks retail investors to define Wall Street jargon

New Word Order

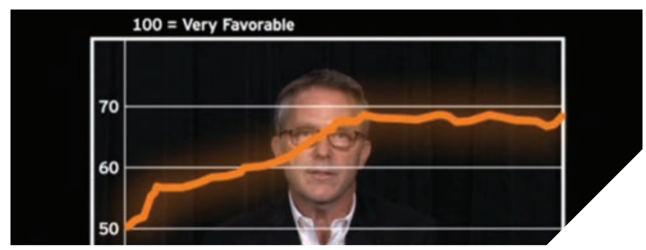
Video of the worst boardroom presentation—ever

Final Word 2



A video simulation of a visit to a doctor who does not know how to communicate risks

M.A.I.N. Street



The emotional responses investors have to referral requests

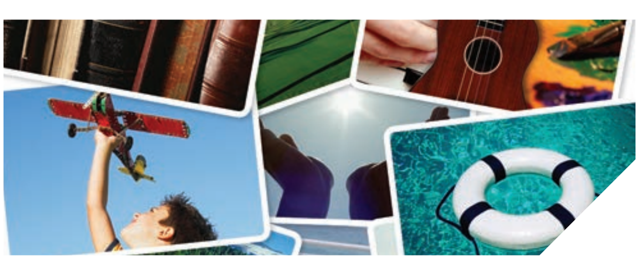
Preferrals

Helping advisors communicate their value proposition using the Hollywood logline technique

Tell Me More

A mock newscast showing a utility company defending its fees—with mixed results

The Language of Fees



Using vision cards to envision retirement

The New Retirementality

How to present—and not present—as a team

Boardroom Presenting

Invesco Consulting (I•C) specializes in unique and creative ideas for financial professionals. Each of our 25+ compelling programs—based on leading-edge research and organized into five sales consulting disciplines—is designed to help you turn your biggest challenges into opportunities. Whether you need to improve your communication skills with clients and prospects, build and maintain your high-net-worth client base, or master today's fast-changing retirement landscape, we have multiple programs tailored to fit your needs.

I•C's team of presenters, developers and support staff is dedicated to finding actionable answers to the unique challenges within financial services. Founded in 1998, I•C has helped more than 644,000 financial advisors, high-net-worth teams, variable annuity producers, retirement specialists and home office managers get, keep and grow business through its speaking engagements from December 2001-December 2017.

This material and the referenced Invesco Consulting programs are for illustrative, informational, educational and entertainment purposes only. We make no guarantee that participation in any of these programs or utilization of any of their content will result in increased business.

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

Visit us at **invesco.com/ic**, where financial professionals can access Invesco Consulting resources.

National Wirehouse
800-998-4246

Broker Dealer
800-421-0807

Retirement Division
800-370-1519

Insurance and Education Sales Division
800-410-4246

Registered Investment Advisor (RIA)
800-421-4023

Exchange-Traded Funds
800-983-0903

CollegeBound 529 Client Service
877-615-4116

CollegeBund 529 Sales Support
800-410-4246, ext. 0529

Fund Account Information
800-457-0630

Media appearances

The Wall Street Journal, Aug. 10, 2015
"Study shows that some labels are toxic, including 'alternative investment' itself"

Reuters, Dec. 5, 2014
"Your practice: The art of choosing words that clients want to hear"

Dow Jones, Sep. 1, 2015
"Future returns"

InvestmentNews, Jun. 22, 2015
"Investors lose patience with alts, but now is no time to quit"

The New York Times, Jun. 28, 2014
"Retirement plans thrown into disarray by a divorce"

PlanAdviser, Feb. 1, 2013
"What you need to know about... PowerPoint presentations"

CNW, Sep. 9, 2014
"Invesco Canada kicks off advisor road-show season"

Research, Jul. 29, 2013
"Getting referrals your own way"

Published books

Picture Your Prosperity
Smart Moves to Turn Your Vision into Reality

By Ellen Rogin & Lisa Kueng
Published by the Penguin Group (2015)

The Millionaire's Advisor
High-Touch, High-Profit Relationship Management of Advisors to the Wealthy

By Russ Alan Prince and Brett Van Bortel
Published by Institutional Investor News (2003)

RainMaker
Strategic Partnering with Attorneys and Accountants to Create a Pipeline of New Affluent Clients

By Russ Alan Prince and Brett Van Bortel
Published by National Underwriter Company (2006)

The Top Performer's Guide to Speeches and Presentations
Essential Skills That Put You on Top

By Tim Ursiny, Ph.D., and Gary DeMoss with Jim Morel
Published by Sourcebooks, Inc (2007)

Coaching the Sale
Discover the Issues, Discuss Solutions and Decide an Outcome!

By Tim Ursiny, Ph.D., and Gary DeMoss with Jim Morel
Published by Sourcebooks, Inc. (2006)

The Language of Trust
Selling Ideas in a World of Skeptics

By Michael Maslansky with Scott West, Gary DeMoss and David Saylor
Published by Prentice Hall Press (2010)

StorySelling for Financial Advisors
How Top Producers Sell

By Scott West and Mitch Anthony
Published by Kaplan Publishing (2000)

Get Inspired to Retire
Over 150 Ideas to Help Find Your Retirement

By David Saylor and Greg Heffington with Susan J. Marks
Published by Kaplan Publishing (2006)