Invesco Global Consulting

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) financial professionals refine their stories for prospective affluent investors, institutions and multi-generational families. The key teaching points are based on over 2,000 presentations with over 250 HNW and UHNW institutional teams[1] and on the largest study ever done on the language of financial services.[2]

Based partially on the work of

- Gary DeMoss, Managing Director Consulting Development & Delivery, who has trained thousands of investment professionals on consultative selling and presentation skills
- Maslansky + Partners
- "Showtime" coaching sessions with HNW, UHNW and institutional teams

Skills to be developed from the presentation

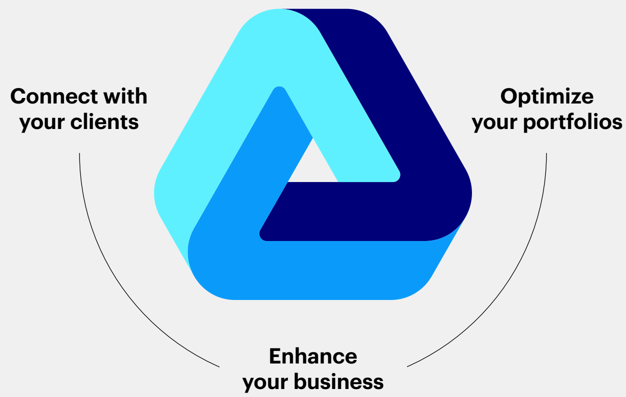
Attendees are shown:

- 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"

[1] Source: Invesco Global Consulting database 12/31/2001-12/31/2017
[2] The largest study ever done on the language of financial services has been conducted by Invesco Global Consulting and Maslansky + Partners since 2007. Invesco Distributors, Inc. is not affiliated with Maslansky + Partners.

HNW = high-net-worth = $1 million to $ 5 million in liquid financial assets (USD).
UHNW = ultra-hiigh-net-worth = >5 million in liquid financial assets (USD).

Invesco Total CX



Invesco Total CX — the Total Client Experience™ — is a powerful platform and partnership with the tools, coaching, and content designed to help you achieve greater possibilities — all in one place and tailored to your specific needs.

Connect with your clients

- **Choose the right words** with resources designed to deepen trust and client scripts backed by studies on effective language.
- **Build client confidence** with resources designed to help clients adopt sound investing principles and stick with their plans.
- **Share market insights** on the latest trends and policies impacting global markets.

Enhance your business

- **Benchmark your practice** with our first-of-its-kind[1] diagnostic - the Practice Innovation Index - powered by Invesco and Cerulli Associates.
- **Create a reliable new business pipeline** with research-based processes designed to help you drive referrals and cultivate new business.
- **Drive efficiency in your practice** with leading resources designed to create capacity, motivate your team, and develop a succession strategy.

Optimize your portfolios

- **Strengthen your investment process** with tools and expertise designed to help you craft portfolios that sync your clients wealth plan and purpose.
- **Manage with conviction** using our proprietary frameworks, asset class views, and portfolio management tools.
- **Draw from a range of potential solutions**, including 1000+ investment strategies across asset classes and vehicles.

Contact us

National Wirehouse
1 800 998 4246

Independent and Broker Dealer
1 800 421 0807

Registered Investment Advisor (RIA)
1 800 421 4023

Retirement
1 800 370 1519

Insurance/Third Party
1 800 410 4246

Bank and Trust
1 800 421 4023

[1]Source: Cerulli Associates. Used with permission.

"Showtime" is based on Invesco Global Consulting'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, published by Institutional Investor News (2003), *Wealth Management: The New Business Model for Financial Advisors*, by Russ Alan Prince and Hannah Shaw Grove, published by Penton Media (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 the National Underwriter Company (2006), *The Top Performer's Guide to Speeches and Presentations*, by Tim Ursiny and Gary DeMoss, published by Sourcebooks, Inc. (2007), and *StorySelling for Financial Advisors: How Top Producers Sell*, by Scott West and Mitch Anthony, published by Kaplan Publishing (2000). Used with permission. Invesco Distributors, Inc. is affiliated with neither 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 nor Bob DeRosa.

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All data created by Invesco Global Consulting unless otherwise noted.

Note: Not all products, materials or services available at all firms. Financial professionals should contact their home offices.

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