

The Art of the Answer

Toolkit

Answering the questions shown to win RFPs



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A request for proposal (RFP) is a project announcement posted publicly by an organization indicating that bids for contractors to complete the project are sought.

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Getting started

Where do these insights come from?

Invesco Global Consulting

The industry's largest communication and consulting services group with a focus on financial professionals.¹

- 2,000 elite financial professionals coached each year since 2011,² currently representing over 60% of the Barron's Top 100³
- 35+ researched-based programs developed
- Presentations to 40,000 financial professionals attending conferences each year⁴

maslansky+partners

Instant dial-response technology finds the emotional reactions investors have to the language of financial services.⁵

- Leader in uncovering emotional responses to language
- Political consultant and word specialist
- 21 studies completed in 4 countries in 3 different languages



MARINA RETIREMENT LLC
Your Fiduciary Anchor

Marina Edwards⁶

- Retirement plan consulting
- ERISA fiduciary consulting

¹Source: RA Prince & Associates, Inc. as of 3/31/20. The ranking of "largest" is based on number of full-time employees on the Invesco Global Consulting team.

²Source: Invesco Global Consulting database (2011 - 2022)

³As defined by *Barron's* and *Forbes*

⁴Source: Invesco Global Consulting database (1998-2023)

⁵Information provided by Maslansky + Partners, 2022.

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⁶Information provided by Marina Retirement, LLC.

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The Research Findings



We have found that using instant dial-response technology to measure the emotional response people have to the conventional boardroom language provides unique insights into what works and what doesn't.



Answers shown to win RFPs

In today's competitive landscape, successfully navigating RFPs is, in our view, crucial for securing business opportunities. Despite the complexity and often daunting nature of RFPs with an increasing volume of work, we believe mastering the art of effective responses is more important than ever.

Statistics reveal that while the average RFP turnaround time ranges from 11-20 days, the success rate for many teams remains below 25%.¹ Furthermore, an anticipated rise in RFP volumes underscores the need for a strategic approach.

We have found that the key to success often lies in understanding why RFPs fail. Common pitfalls include incomplete or inaccurate responses, a lack of insight into the client's needs, uncompetitive pricing, inadequate team qualifications, and ineffective proposal presentations.

To address these challenges, Invesco Global Consulting has collaborated with RFP expert Marina Edwards and communication specialist Maslansky + Partners. This partnership has culminated in a program complete with practical research and insights, designed to equip you with the necessary skills to turn potential opportunities into wins. Our goal is to empower you with knowledge and strategies, helping you not only meet but also exceed the expectations of your next winnable RFP.

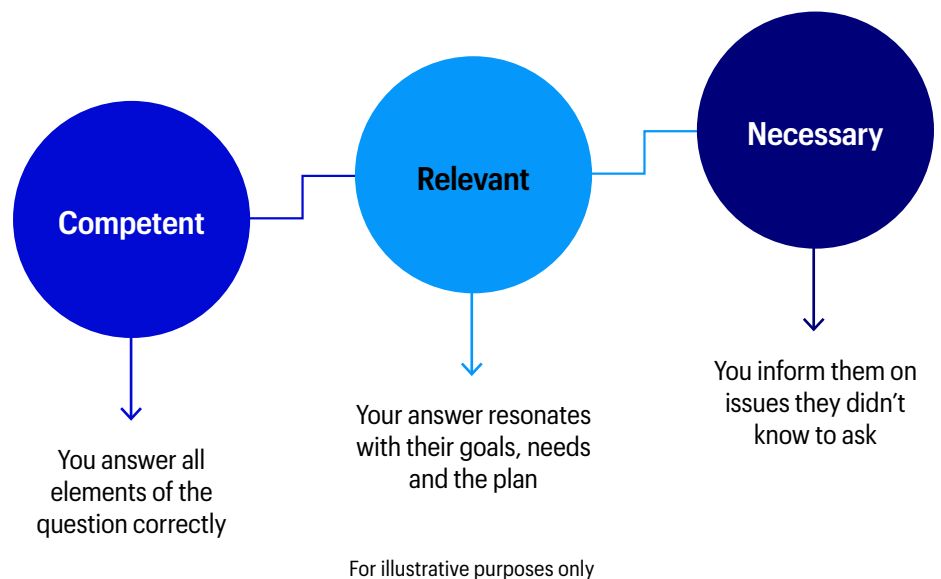
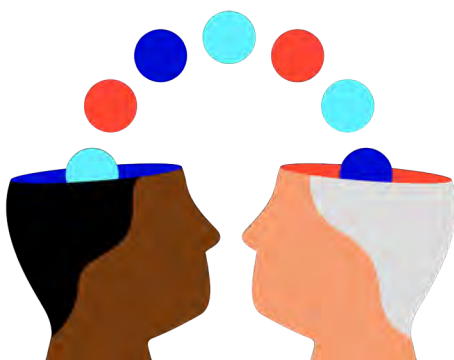
¹Source: *The Cerulli Report --U.S. Institutional Marketing and Sales Organizations 2023*

The Research Findings



What do you want your answer to say about you?

Because we are not at the table to present our thoughts, we want our responses to reveal something about us. First, by answering all aspects of the questions according to their instructions, we show that we are **competent**. Second, our responses need to line up with what likely matters to clients and solving their needs, which demonstrates we are **relevant**. And finally, bringing new ideas that position you as a trusted partner may make them feel you are **necessary** to their success.



Understanding the language shown to win RFPs

In the realm of RFP responses, especially for financial professionals, we believe it's vital to understand and apply four universal communication principles: **positive**, **plausible**, **plainspoken**, and **personal**. In our view, these principles form the bedrock of crafting clear, concise, and compelling answers that resonate with RFP evaluators. Let's delve into each principle, concluding each section with key takeaways based on specific results from the research.



4 universal communication principles

Positive

Being positive in your RFP responses means focusing on the potential benefits and advantages of your services while avoiding negative language or criticism of competitors. Phrases emphasizing potential benefits, such as "managing longevity risk" or "reducing your downside risk," were more appealing to investors. For example, managing longevity risk had a 90% positive response rate. The study also indicated that respondents preferred terms like "costs" over "fees," highlighting the value of positive framing.¹

Plausible

Plausibility involves presenting your services and capabilities realistically, without over-promising or using hyperbolic sales language. In our research, 64% of respondents reacted negatively to claims like "No one can provide you with the services we can."² This indicates that evaluators are wary of exaggerated claims and prefer more grounded, realistic statements.

Plainspoken

Being plainspoken means communicating in clear, straightforward language, free from jargon and complexity. Our survey highlighted the challenges of "Finglish" – financial English – where terms like "dollar-cost averaging" can be confusing.³ Clarity and simplicity in language make your responses more accessible and understandable to a broader audience.

Personal

Personalizing your responses involves tailoring them to the specific needs and values of the RFP issuer. We found that 58% of plan sponsors preferred "personalized" services as opposed to 42% preferring "customized" services,² demonstrating a deep understanding of the client's unique challenges and customizing your responses accordingly may increase the impact of your proposal.

¹Source: National survey in 2011 by Invesco Global Consulting of 800 investors who typically invest in mutual funds, aged 26-64 years. 50% with income > \$100k, 71% with investable assets > \$100k, 100% working with financial professionals.

²Source: National survey in 2015 by Invesco Global Consulting of 500 plan sponsors.

³Source: National survey in 2017 by Invesco Global Consulting of 1,000 investors.

The Research Findings



In summary

The synthesis of these principles into your RFP responses may enhance their effectiveness. Each principle brings a unique dimension:

Positive

Focuses on the potential benefits and reframes language to be more appealing

Plausible

Helps to ensure credibility and to avoid overstatements

Plainspoken

Helps to make the proposal accessible and understandable

Personal

Tailors the response to the specific needs and context of the RFP issuer

Incorporating these principles in a balanced manner can potentially transform your RFP responses, making them more aligned with evaluators' expectations and increasing your chances of success. The research-based evidence underscores the importance of these principles in the financial professional's domain, where clarity, credibility, and connection have been shown to be key in winning proposals.

The Research Findings



**It's not what you say,
it's what they hear®**

"It's not what you say, it's what they hear." is a registered trademark of Maslansky + Partners. Used with permission.

¹The 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.

²Source: Study conducted by Invesco Global Consulting and Maslansky + Partners since 2007.

³Source: 2021 survey by Invesco Global Consulting of 500 accredited investors (75% with > \$1mm in investable assets, 47% with > \$1.5mm in investable assets, 52% male, 48% female, 75% with real estate investing experience and 100% of whom utilized the services of a financial professional).

⁴Source: 2015 survey by Invesco Global Consulting of 800 North American investors.

⁵Source: July 2021 survey by Invesco Global Consulting of 600 Canadian investors.

⁶Source: 2016 survey by Invesco Global Consulting of 800 US investors.

⁷Source: 2016 survey by Invesco Global Consulting of 800 US investors.

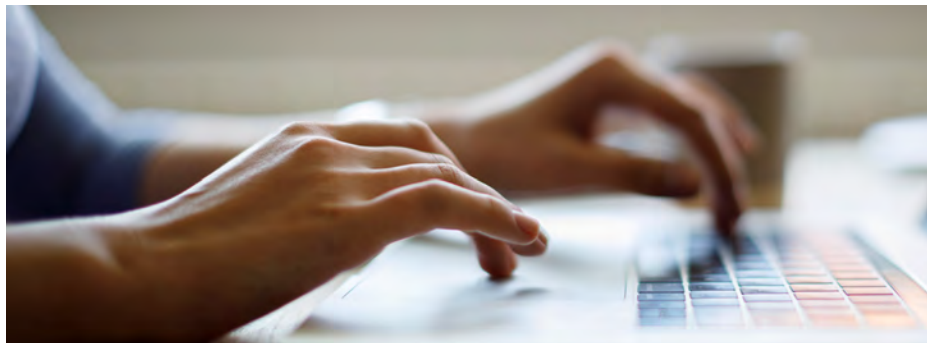
⁸Source: national survey in 2011 by Invesco Global Consulting of 800 investors who typically invest in mutual funds, aged 26-64 years. 50% with income > \$100k, 71% with investable assets > \$100k, 100% working with financial professionals.

⁹Source: 2017 North American survey by Invesco Global Consulting of 1,000 investors.

¹⁰Source: 2018 survey by Invesco Global Consulting of 800 DC plan participants.

¹¹Source: March 2020 study by Invesco Global Consulting of 1,037 North American investors.

¹²Source: 2015 survey by Invesco Global Consulting of 300 investors



Words to use, words to lose

Choose your words carefully

This guide presents strategic language choices for your RFP responses, based on comprehensive research conducted as part of the largest study ever done on the language of financial services¹ in areas like financial professional value, regulations, ETFs, alternative investments, retirement plans, and annuities. It emphasizes the role of words in shaping investor perceptions and reactions to your message, potentially helping to ensure effective communication.

"Words to use"	"Words to lose"
Portion ²	All ²
Consistent rental income ³	Alternative rental income ³
Growth ³	Appreciation ³
Baskets ⁴	Buckets ⁴
Inclusive fees ⁵	Bundled fees ⁵
Personalized ⁶	Customized ⁶
Smart technology ⁷	Cutting-edge technology ⁷
Automatic ⁸	Default ⁸
Result-based investing ⁸	Disciplined investing ⁸
Targeted ⁹	Distinct ⁹
Comprehensive diversification ³	Diversification ³
Automatic monthly investments ¹⁰	Dollar-cost averaging ¹⁰
Comfortable retirement ¹¹	Dream retirement ¹¹
Inform ¹²	Educate ¹²
Knowledge ⁶	Experience ⁶
Participate ⁴	Exposure ⁴
Cost ¹¹	Fees ¹¹
Financial security ¹¹	Financial freedom ¹¹
Financial planning ⁹	Financial plan ⁹
Protect ⁸	Guarantee ⁸

The Research Findings



¹Source: July 2021 survey by Invesco Global Consulting of 600 Canadian investors.

²Source: 2015 survey by Invesco Global Consulting of 800 North American investors.

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“Words to use”	“Words to lose”
Recommends only strategies that make sense for your needs ¹	Has a fiduciary duty ¹
Balance risks ²	Hedge risks ²
Objective ¹	Independent ¹
Estate planning ³	Legacy planning ³
More conservative over time ⁴	Less aggressive over time ⁴
More consistent ²	Less volatile ²
Flat fee ³	Level fee ³
Flexibility for short-term needs ¹	Liquidity ¹
Cost-efficient ⁵	Low-cost ⁵
Making sure you can afford to maintain your lifestyle ³	Managing inflation risk ³
Making sure you have enough money as long as you live ³	Managing longevity risk ³
Making sure you can participate in the gains while reducing your downside risk ³	Managing market risk ³
Standard account fee ¹	Mandatory fee ¹
Maximize returns ⁶	Minimize risks ⁶
Investment income ⁷	Nest egg ⁷
Works as advertised ³	New and improved ³
Behaves independently ²	Non-correlated ²
Our approach ³	Our mission ³
Index ⁵	Passive ⁵
Industry leader ²	Pioneer ²
Portfolio that adjusts ⁴	Portfolio that rebalances ⁴
Anticipate ³	Predict ³
Coordinated financial care ⁸	Quarterbacking financial care ⁸
Responsive ²	Reactive ²
Meetings as they are needed ¹	Regular meetings ¹
Accountable ⁹	Responsible ⁹
Risk comfort level ¹	Risk tolerance ¹
Risk-defined ⁴	Risk-constrained ⁴
Complementary investments ²	Satellite investments ²
Strategy ⁴	Solutions ⁴
Investment right for you ⁸	Top-rated investments ⁸
We provide ⁷	We offer ⁷
Cautious optimism ³	Win by not losing ³
Income ¹⁰	Yield ¹⁰
Behaves independently ²	Non-correlated ²

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The Top 20 Checklist



The Top **20** Checklist

The Art of the Answer

This Top 20 checklist is designed to guide you on language and tone, while cautioning against detrimental approaches. Our goal is that your adherence to these guidelines will help make your answers engaging, credible, and tailored, enhancing your chances of winning RFPs.

Basic: Understand the ask

- 1. Carefully review RFP, instructions, and timelines upon receipt; develop follow-up questions.
- 2. Follow communication instructions precisely, including cover sheets, file formats, and organized file attachments. When print copies are requested, use wider margins and spiral binding.
- 3. Adhere to the "do not call" list unless otherwise specified.
- 4. Read and answer questions literally (i.e., "organizational chart," "list," "describe") and avoid "See our previous answer to Q#."

This checklist is based on findings from Invesco Global Consulting's work with Marina Edwards, founder of Marina Retirement, LLC, and Maslansky + Partners. Invesco Distributors is affiliated with none of Marina Edwards, Marina Retirement, LLC or Maslansky + Partners. For illustrative purposes only

The Top 20 Checklist

The Art of the Answer



Positive: Make your message easy to like

- 5. Avoid criticizing competitors (even subtly) in your responses.
- 6. Use "cost of service" instead of "fee" for a more positive and value-oriented perspective.¹
- 7. Lead with potential benefits.
- 8. Highlight what you already know about their plan, and discuss experiences with similar and larger plans, highlighting trends in bigger plans; offer a market benchmark.
- 9. Highlight potential future "blind spots" and how you might help navigate those; provide some free consulting.

Plausible: Make your message easy to agree with

- 10. Avoid sales language, i.e., claiming to be "the best," "the most," "the only."
- 11. Anticipate the backstory behind RFP questions. What are they trying to solve?
- 12. Showcase how your services may lighten their workload as a partner and help them navigate the issues and changes.

Plainspoken: Make your message understandable

- 13. Avoid jargon, acronyms, ease of readability, use of charts/tables, and carefully final-proof and analyze each question, addressing all sub-questions, and in order if sub-questions
- 14. Begin with "yes" / "no" where possible.
- 15. Prioritize important information.
- 16. Include concise biographies in answers, with full bios in the appendix.

Personal: Make your message relevant to your audience

- 17. Personalize responses for the company; use caution when copying and pasting unless questions are identical.
- 18. Research and align their company's values into your value proposition.
- 19. Tailor responses based on the plan's size—white glove service or leverage from larger plans.
- 20. Analyze the Form 5500 and Form 10k, suggesting enhancements; BE CAREFUL about highlighting possible fiduciary breaches.

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The Answer Gallery



Sample answers to commonly asked RFP questions shown to win RFPs

The following four sample answers contrast weak answers on the left with answers shown to win on the right, with highlighted text to focus on how the answers are not aligned with universal communication principles.

Describe your approach to client service, including how such service will be offered. If you have a template agreement for the provision of such services, please provide a copy.

Negative tone

“Our approach is to give our clients the wonderful experience they deserve and expect! They rely on us to provide platinum service with urgent response times. Everything we do is done in-house so we can control quality and deliverables.

“We are strongly opposed to the trend among firms to create ways to turn your employees into profit centers for their business. Predominantly, this is done by utilizing their own investment fund or customized models that contain significant fees buried within the prospectus. They offer a robust participant education model as a conduit to drive unsuspecting participants to these higher margin models, private fee-based services or other commission-based financial products.”

Positive tone

“Quality control: Our commitment to exceptional client service is ingrained in every facet of our approach. We prioritize providing a top-tier experience for our clients, catering to their needs with a sense of urgency and precision that sets the standard for platinum service. By managing all operations in-house, we aim to ensure stringent control over quality and deliverables, fostering an environment of trust and reliability for our clients.

“Custom participant allocations: We refrain from offering any proprietary products or investment models. Instead, we offer custom asset-allocation models to participants at no additional cost, integrated seamlessly into the existing recordkeeping platform. Our dedication to transparency is reflected in our firm stance against utilizing participants for profit.”

If this illustration is used outside of the designated audience, it is the respective user's responsibility to ensure that such material complies with all applicable regulations and is filed with the appropriate regulatory bodies if so required. Words and phrases utilized should always be appropriate, applicable and provable. This scenario is fictional and is shown for illustrative purposes only.

The Answer Gallery

Describe what differentiates your firm from your competitors (provide specific examples).

Improbable claims	Plausible claims
<ul style="list-style-type: none"> • “We always do the right thing for you and your participants.” • “We’re independent and have no proprietary products. We work with all recordkeepers.” • “You will always have the best investments at the lowest cost. No other group has criteria as strict as us. We demand the best!” • “We are local—five minutes from your office. This ensures quick and local service response.” • “We specialize in healthcare. We work with physicians, nurses, and pharmacists every day. We know them well and their service needs.” • “We are a top firm with your recordkeeper. They’re our largest recordkeeper provider, and we know them well. We have power to negotiate the lowest price and enhanced services.” 	<p>“Key advantages: In our view, one significant differentiator is our unwavering commitment to integrity and sincerity in all our client interactions, building relationships founded on trust and mutual respect. We believe independence serves as a key advantage, as we collaborate with various recordkeepers, working to ensure an unbiased approach to our services.</p> <p>“Investment criteria: Furthermore, our stringent criteria for selecting investments is designed to help ensure that our clients gain access to high-quality investments at competitive costs.”</p> <p>“Recordkeeper leverage: We have scale with your provider which may help obtain preferred pricing.”</p>

What tools does your firm use to evaluate investment funds and managers? Which of these tools are proprietary to your firm, developed in-house or specifically for your firm?

Unclear language	Plain-spoken language
<p>“We utilize four tools to ensure the best investments at the lowest cost. These are very detailed and proven applications to provide us the data we need to gain the most knowledge when making selections. We are told over and over that our criteria and screening process is second-to-none.”</p> <ul style="list-style-type: none"> • Fi360 • Aladdin • Morningstar • Riskalyze <p>None are proprietary.”</p>	<p>“Our tools: Here are brief descriptions of the tools we use to evaluate investment funds and managers:</p> <ul style="list-style-type: none"> • Fi360: A tool built to help assess and manage investment fiduciary risk. • Aladdin: A comprehensive risk management tool designed to be used for making informed investment decisions. • Morningstar: A widely recognized investment research and analysis tool that provides data and insights on various funds and managers. • Riskalyze: A tool that designed to assist in determining the risk tolerance and preferences of clients, aiding in the selection of suitable investments. <p>Non-Proprietary. These tools are not developed exclusively for our firm; they are widely used in the industry to aid in uniform evaluation of the funds.”</p>

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Describe how your firm ensures the proper documentation of the delegation of duties between the Company's board to its 401(k) plan/investment committee to help protect the board and management.

Generic answer

"All roles and responsibilities are documented in writing. Plan **fiduciaries are identified** in the plan document and company resolution. Board members are NOT typically listed as fiduciaries on a plan.

"**Minutes are typed** after every meeting to document attendees, recommendations, actions taken, and responsible parties."

Personal answer

"Proactive review: We take a proactive approach designed to help ensure the proper documentation of the delegation of fiduciary duties. We begin by carefully reviewing your current delegation process to in an effort to help **identify any potential gaps** or areas for improvement.

"Draft charter: Next we draft a comprehensive charter document that reflects the fiduciary structure, outlining a clear framework for the delegation of responsibilities.

"Partner with legal: We work closely with legal counsel to collaborate on proper fiduciary delegations among all service providers, including identifying the responsible parties to monitor the named fiduciaries."

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Summary

As we consider our answers, the following principles should guide our responses.

- **Positive:** Be sensitive to blaming regulators or in any way speaking negatively about the competition.
- **Plausible:** Be sure your responses are believable and avoid superlatives.
- **Plainspoken:** Avoid industry jargon especially financial acronyms.
- **Personal:** Make our audiences feel like we are speaking directly to them. The use of personal pronouns ("you" and "your") will likely help to create personal messaging.

For guidance in implementing this strategy effectively or for more comprehensive help in honing and refining your practice and team, reach out to your Invesco Senior Advisor Consultant.



How do you and your practice stack up against your peers?

The competition for clients and AUM is fierce, and until now, there has been no diagnostic to tell you how you compare against your peers¹ and certainly no diagnostic coupled with research-backed resources designed to help you in areas where you want to improve.

Introducing the Practice Innovation Index, the benchmark for high-performing financial professionals, harnessing the power of Cerulli Associates, a leading research, consulting, and analytics firm. It's easy to use the Practice Innovation Index.

Take the online diagnostic by answering 35 questions that are correlated with four key areas of your practice: New Business Development, Wealth Management, Client Service and Practice Management. Get your scores in each area, and see a clear view of your relative strengths and opportunities in an effort to refine your practice.

We'll show you where you stand relative to your top-performing peers. You'll identify specific areas of focus for working to enhance your business. And you'll receive a customized roadmap of practical action strategies delivered through Invesco's robust coaching and consulting programs.

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

For guidance in implementing this strategy effectively or more comprehensive help in honing and refining your practice and team, reach out to your Invesco Senior Advisor Consultant.

Email IGC at pii@invesco.com



Follow the QR code to take the Practice Innovation Index diagnostic and see how you stack up against your peers.

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

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- **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-kind¹ 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.

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1 800 421 0807

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1 800 421 4023

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1 800 370 1519

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