Invesco

Invesco Total CX

Many products and services seek to help busy financial professionals manage their practice more effectively. But they often fail to account for the many roles you fill each day.

That's why we created **Invesco Total CX** — the total client experience. It's a powerful platform with the tools, coaching and content you need to achieve greater possibilities — all in one place.

Invesco Total CX aims to help you **connect with your clients**, **enhance your business**, and **optimize your portfolios.**

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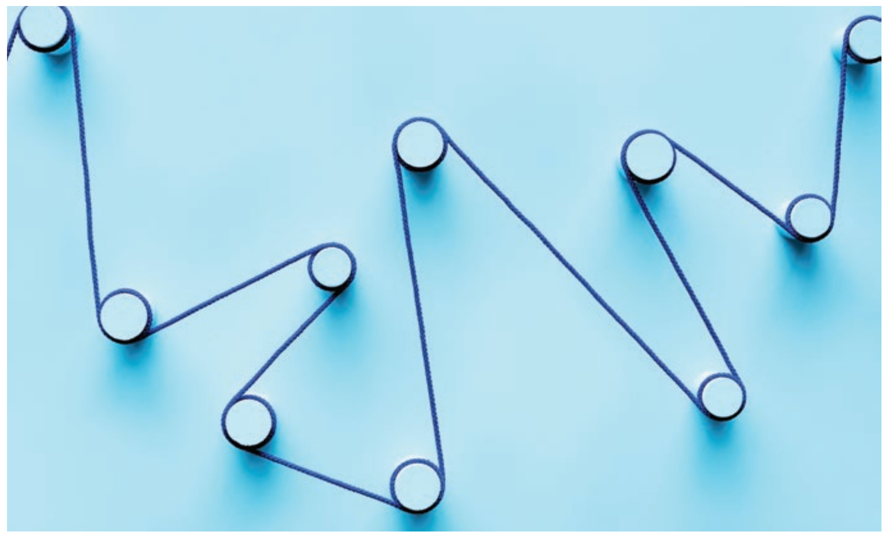
Connect with your clients



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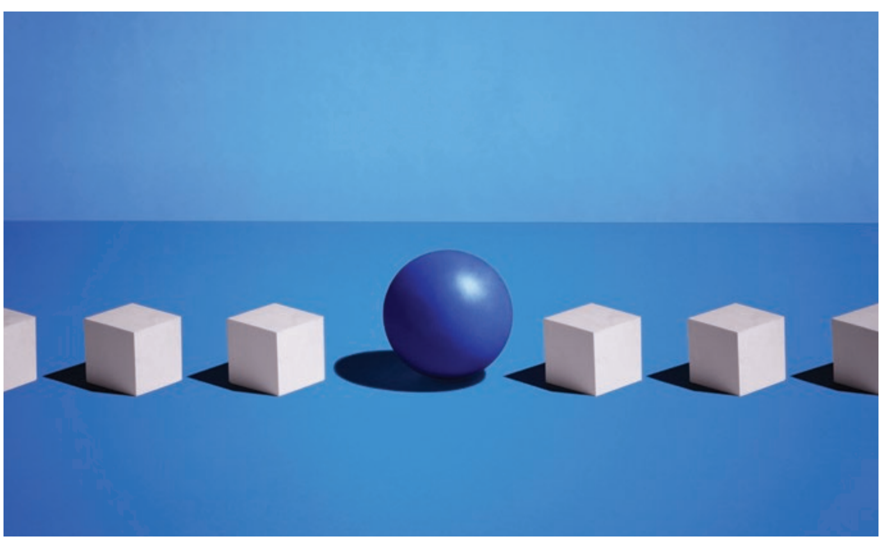
Enhance your business



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Optimize your portfolios

Connect with your clients

Language Research | Empowering Content | Timely Perspectives

→
How you connect with your clients will vary quite a bit. Here are a few ways we can help:

1

Using the power of **Deep Discovery** and **Fi•natical Curiosity** to truly understand this family's unique challenges and long-term goals.

2

Sharing the potential benefits of **529 College Savings** plans.

3

Showing engaging visuals from **Compelling Wealth Management Conversations** on staying buckled-in during changing market environments.

4

Communicating pricing and value proposition using language guidance from **Priceless**.

Choose the right words

Resources designed to deepen trust, and client scripts backed by what has become the largest study[1] ever conducted on the language of financial services.

Fi•natical Curiosity
Embrace the power of curiosity to capture more client assets.

Deep Discovery
Conduct an effective and efficient Discovery Meeting.

T.E.A.M. Dynamics
How to use personality dynamics to attract and retain clients.

New Word Order
In-depth research about language to use for more effective client communication.

Priceless
Research-based guidance to confidently communicate your professional value.

The Golden Hour
An effective, easy to implement client retention model.

Building Opportunities
Research-based language to use with investors when introducing real estate investments.

Build client confidence

Context and resources to help clients adopt sound investing principles, navigate markets and stick with investment plans.

Compelling Wealth Management Conversations
Leverage the power of analogy and illustration to keep investors "buckled in" to their long-term investment strategy.

Financial Literacy
Address financial challenges clients will need to consider at every major life stage.

Trending Conversations
Historical context and current insights to address topical concerns.

Invesco QQQ How Not to Suck at Money
A game for college students and anyone with a desire to learn more about money.

Identity Theft
An actionable program for clients to learn how to protect themselves, their families and their identities.

Your Prosperity Picture
A five-step system to engage and empower female investors.

ETF Education
101-level content on asset classes to help clients gain comfort in ETF investing.

529 Education
Educate clients about the potential advantages of 529s.

Share market insights

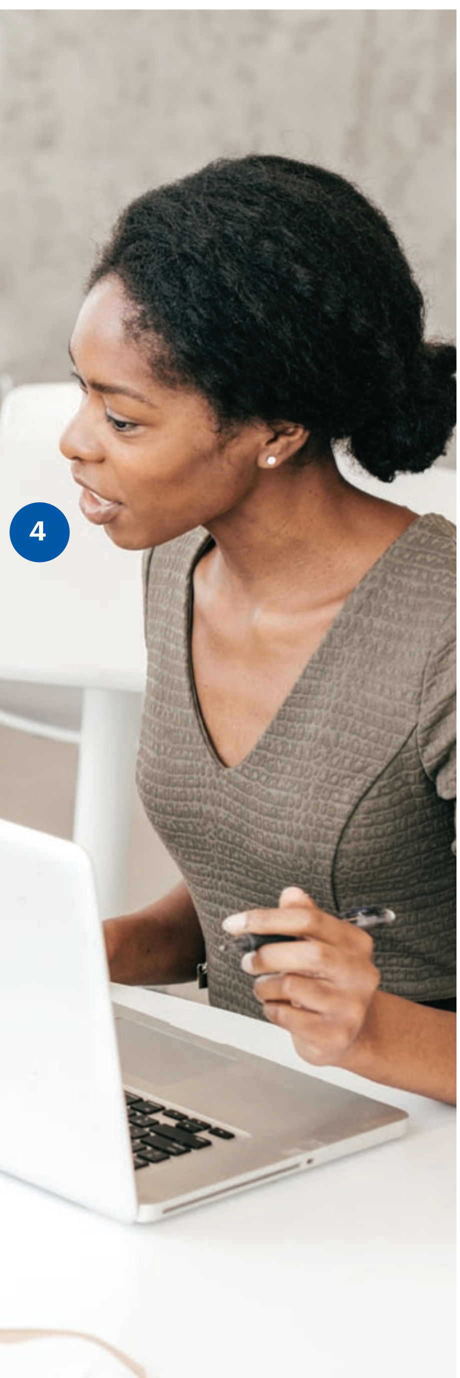
Client-friendly market insights on the latest trends and policies impacting global markets.

Greater Possibilities Podcast
Candid conversations with industry experts about investment and market possibilities.

Market & Economic Insights
Fresh perspectives on events impacting the global markets.

Portfolio playbook
A monthly overview of the markets and economy with investment ideas to consider.

Washington Commentary
Latest insights on key issues from the Beltway impacting the industry.



Elevate your client interactions with the support of our time-tested client-management strategies, insights and resources.

Enhance your business

Practice Diagnostics | Peer Benchmarking | Coaching Resources

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Building and running a business can be challenging. Here are a few ways we can help:

1

Reviewing **Practice Innovation Index** results to discuss areas of strength and mapping out an action plan to improve in priority areas.

2

Discussing their team "story" and marketing plan ideas using **Build your Brand with Powerful Marketing**.

3

Planning team offsite agenda centered around **Managing Synergistic Teams, Boardroom Presenting, and Transformational Leadership**.

Benchmark your practice

Benchmark your practice with the first diagnostic[2] to analyze peer ranking and provide custom resources designed to help in every area of your practice — powered by Invesco and Cerulli Associates.[3]

Practice Innovation Index
Benchmark your practice against high-performing financial professionals.

Create a reliable new business pipeline

Research-based processes designed to help you drive referrals, build strategic partnerships, and cultivate new business.

The Referral Code
How elite financial professionals create pipelines of high-net worth referrals from attorneys and accountants.

Preferrals
A research-based template for you to personalize and use to comfortably pursue referrals.

Showtime
A proven structure to tell your story in a clear, concise, compelling manner, built on the 3 key questions of top clients.

Build your Brand with Powerful Marketing
Develop a practical marketing plan and client-centric brand story.

Boardroom Presenting
Little-known skills and strategies to win high-stakes presentations in the boardroom.

The Model Practice
Help optimize your portfolios, enhance your business, and connect with your clients using the expertise of Invesco.

Drive efficiency in your practice

Industry-leading resources[4] designed to create capacity, motivate your team, and develop a long-term succession strategy.

Crafting a High-Performance Practice
A multi-step process designed to enhance your business structure.

Construction and Managing a Synergistic Team
Insight and guidelines on coming together as a complementary, cohesive team.

Segmentation & Service
How to segment your client base and stratify client service.

Comprehensive Client Reviews
A comprehensive structure for client reviews.

Optimizing the Talents of your Team
How to navigate team talents, roles and responsibilities and capacity issues.

Team Meetings for High Performance
A strategy for conducting efficient, effective team meetings.

Team Compensation Structure
The foundational principles and suggested structure for team compensation.

Transformational Leadership
Five areas of focus to move from transactional to transformative leadership.

Team Leadership
Create an engaged, fulfilled, and high-performing team with long-term strategies.

Changing the Guard
A comprehensive approach to succession planning.

Grow your practice and optimize your team's performance in a complex and competitive environment.

Optimize your portfolios

Custom Analytics | Actionable Expertise | Diverse Solutions

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Achieving better client investing outcomes takes commitment. Here are a few ways we can help:

1. Reviewing **portfolio consultation report** to help identify unintended risks in portfolio.
2. **Portfolio playbook** to review what's happening in the market and what allocations to consider.
3. **Capital market assumptions** for future expected returns.
4. Listening to Portfolio Managers on the **Greater Possibilities podcast**.
5. Researching from a list of **potential solutions** for client portfolios.

Strengthen your investment process

Analytical tools and expertise to help you craft portfolios aligned to your client's wealth plan and purpose.

Capital Market Assumptions
A tool designed to better forecast investment risk, returns, and correlations across asset classes.

Custom Portfolio Analysis
Analytics designed to help you manage risk, identify opportunities, and uncover unintended portfolio exposures.

Wealth Management Implementation Checklist
A framework to implement more holistic wealth management.

Manage portfolios with conviction

Proprietary macro frameworks, asset class views, and portfolio management tools.

Portfolio Playbook
An actionable overview of what's happening in the markets and economy and how to consider positioning your portfolios, updated monthly.

Investment Insights
Insights on investing implications, market movements, and structural changes in a shifting world.

Market & Economic Insights
Fresh perspectives on events impacting the global markets.

Tactical Asset Allocation
Invest within the business cycle as a complement to longer-term strategic views.

Equity Strategy Playbook
Market indicators that matter most for equity performance, delivered in a visual and digestible format.

Greater Possibilities Podcast
Candid conversations with industry experts about investment and market possibilities.

Draw from a range of solutions

1000+ investment strategies across asset classes and vehicles, as well as model portfolios.

Mutual Funds
A broad range of actively managed, domestic, global, specialty, and fixed income mutual funds.

ETFs
Possibilities are everywhere. With over 200 ETFs, Invesco helps you access them.

Invesco Model Portfolios
Cost-effective model portfolios for a range of specific client outcomes informed by extensive expertise.

Separately Managed Accounts
Tax-efficient, customizable solutions powered by proactive, high-touch service.

Real Estate
We offer a range of solutions in both public and private markets.

Unit Trust
Fixed portfolios of securities to conveniently access an asset class, market sector, or investment discipline.

CollegeBound 529
Designed to help meet your education savings needs with flexible investment options.

Collective Trust Funds
More than 40 actively managed collective trust funds designed exclusively for qualified retirement plans.

Strengthen your investment process and portfolio outcomes with a range of products and expert guidance.

Invesco Total CX is a new way to leverage the power of one of the world's largest asset management firms to help build security for your business and your clients.

If you're ready for a partner who may help you achieve greater possibilities, contact your Invesco consultant or visit Invesco.com/TotalCX to see more of the tools, coaching and content available through Invesco Total CX.

1. 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.
2. Source: Cerulli Associates. Used with permission.
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Note: Not all products, materials or services available at all firms. Financial professionals, please contact your home office.

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Factor investing is an investment strategy in which securities are chosen based on attributes that have been associated with higher returns.

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Holistic wealth is a concept that elevates and emphasizes the importance of collecting experiences (as opposed to just money), engaging in meaningful work, and having more control over your daily life. Holistic wealth also includes developing financial savvy and independence, leading a life of purpose, and establishing a spiritual practice.

An investment in exchange-traded funds (ETFs) may trade at a discount to net asset value, fail to develop an active trading market, halt trading on the listing exchange, fail to track the referenced index, or hold troubled securities. ETFs may involve duplication of management fees and certain other expenses. Certain of the ETFs the fund invests in are leveraged, which can magnify any losses on those investments.

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This information is not intended as a recommendation to invest in a specific asset class or strategy, or as a promise of future performance. These asset class assumptions are passive, and do not consider the impact of active management. Given the complex risk-reward trade-offs involved, we encourage you to consider your judgment and quantitative approaches in setting strategic allocations to asset classes and strategies. This material is not intended to provide, and should not be relied on, for tax advice.

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