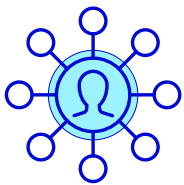


Preferrals

You can't get referrals if you don't ask, but not asking effectively can be damaging to client relationships; enter "Preferrals."

A method for attracting qualified new clients

"Preferrals" is designed to help financial professionals increase their capability in developing client advocacy to attract qualified new clients. This research-based approach seeks to transform the outdated and potentially harming referral approach into a low-risk offer to help friends, colleagues and family members based on the financial professional's genuine concerns. "Preferrals" not only seeks to help financial professionals learn key principles, but it also aims to help them personalize their "preferrals" for immediate application.



Program Toolbox

From principles to practice:

- Keynote presentation¹
- Toolkit, with research results and editable scripts language²

Based on

- Invesco Global Consulting's work with Maslansky + Partners and Cerulli Associates³

¹ Ask your Invesco representative for IGC-PRF-PPT-11.

² Ask your Invesco representative for IGC-PRF-BRO-1-E-FF.

³ "Preferrals" is based on Invesco Global Consulting's work with Advantage Coaching & Training, Cerulli Associates and Invesco Global Consulting I-dials language testing with Maslansky + Partners. Invesco Distributors, Inc. is affiliated with none of Advantage Coaching & Training, Cerulli Associates, Cerulli Inc. or Maslansky + Partners.

Highlights

Our goal is that participants will gain proficiency in how to construct and have the "Preferrals" conversation with both existing clients as well as members of their social networks.

The agenda includes:

- The greatest source of new clients
- Creating client advocacy
- The "Preferrals" method



Invesco Total CX



Invesco Total CX — the Total Client Experience™ — is 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.

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-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.

Contact us

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Independent and Broker Dealer

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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. Invesco Distributors, Inc. is affiliated with neither Cerulli Associates nor Cerulli, Inc.

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