



Brett Van Bortel

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Brett has developed and delivers numerous consulting programs designed to increase the profitability, effectiveness and productivity of financial professionals. As a speaker and consultant, his focus is on new client acquisition through existing client advocates and through centers of influence by building of strategic partnerships with attorneys and CPAs to create a pipeline of HNW referrals. He also works in the Invesco Global Consulting language franchise of content, working to help financial professionals communicate more effectively with clients on numerous subjects. He regularly delivers these presentations to financial professionals in addition to individually coaching top-producing teams.

Brett is a coauthor of *RainMaker: Strategic Partnering with Attorneys and Accountants to Create a Pipeline of New Affluent Clients*,¹ *The Millionaire's Advisor: High-Touch, High-Profit Relationship Management Strategies of Advisors to the Wealthy*² and *Selecting a Coach: 7 Guidelines for Financial Advisors*.³ He is also a regular contributor to *Financial Advisor* magazine. Prior to joining Invesco in 2010 when the firm combined with Van Kampen, Brett worked for Van Kampen Investments for 13 years as a member of Van Kampen Consulting, the predecessor to Invesco Global Consulting, as well as in advertising & marketing.

Brett is married with three children. He enjoys coaching and competing in league sports, as well as skiing, hiking and biking.

¹*RainMaker: Strategic Partnering with Attorneys and Accountants to create a pipeline of New Affluent Clients*, by Russ Alan Prince and Brett Van Bortel (2006), published by the National Underwriter Company

²*The Millionaire's Advisor: High Touch, High Profit Relationship Strategies of Advisors to the Wealthy*, by Russ Alan Prince and Brett Van Bortel (2003), published by Institutional Investor News

³*Selecting a Coach: 7 Guidelines for Financial Advisors*, by Russ Alan Prince, Brett Van Bortel and Tim Ursiny (2005), published by Charter Financial Publishing

Please note that the term "partnership" in this piece does not signify a formal legal relationship among professionals. It is simply intended to describe a mutual, informal relationship among professionals.

HNW = high-net-worth