Fi•natical Curiosity

It pays to ask engaging questions that have been shown to help financial professionals break down barriers and learn more about key clients.

Questions create answers. Curiosity creates connections.

How can financial professionals earn more business from their clients? Curiosity. “Fi•natical Curiosity,” the sequel to our “StorySelling” program, focuses on embracing the power of curiosity with the goal of capturing up to 70% more of client assets. Believing that it’s “who they are, not just what they have,” this program seeks to teach attendees how to learn as much about their clients as possible in the shortest period of time by using the natural order of curiosity and the Q-cards[1] for financial professionals.

Program toolbox: from principles to practice

- **Keynote presentation[2]**: 60 minutes, optimal audience: 30 or more
- **SpeedMeeting workshop:** In this competition workshop, you will be challenged to learn as much about your colleagues as possible using the principles of “Fi•natical Curiosity” and the Q-cards[1] for financial professionals. 50 minutes, optimal audience: 30 or more
- **“The Fi•natical Target[3]”** A two-minute needs-assessment tool designed to evaluate the client’s TOTAL financial situation

Research highlights

- When affluent investors were asked why they had interviewed–but not hired–financial professionals, 86% responded that they understood the financial professionals but that the financial professionals didn’t understand them.[4]

[1] Ask your Invesco representative for VKC-FCUR-CRD-1V.
[2] Ask your Invesco representative for VKC-FCUR-PPT-1I.
[3] Ask your Invesco representative for VKC-FCUR-FLY-2-E.
[4] Source: *Wealth Management: The Business Model For Financial Advisors*, by Russ Alan Prince and Hannah Shaw Grove, published by Penton Media (2003).

Skills to be developed from the presentation

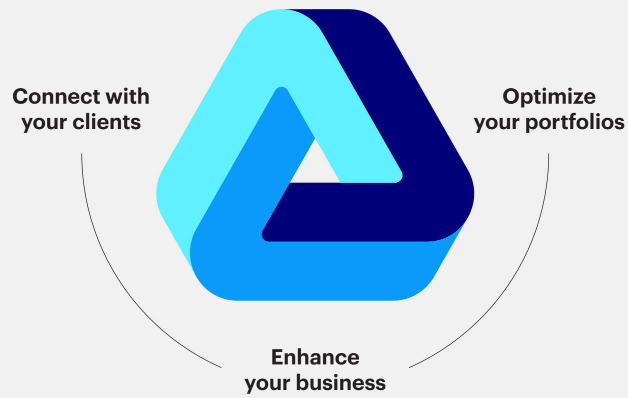
Attendees are shown:

- Why it pays to ask
- How to use the deck of Q-cards[1] with 30 engaging, open-ended questions for clients
- Ways to establish personal connections in six minutes or less
- Eight things they must know about their top clients
- Ways to create a more efficient interview style using the natural order of curiosity

Contributor

- Russ Alan Prince, president of R.A. Prince & Associates, Inc. and author of 27 books on high-net-worth investors
- “The Question Guys” (Bret Nicholaus and Paul Lowrie), authors of the best-selling book, *The Conversation Piece: Creative Questions to Tickle the Mind*, published by Ballantine Books (1992)

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

"Fi•natical Curiosity" is based on Invesco Global Consulting's work with R.A. Prince & Associates, Inc., Russ Alan Prince, "The Question Guys" (Bret Nicholaus and Paul Lowrie) as well as the book, *Wealth Management: The New Business Model for Financial Advisors*, by Russ Alan Prince and Hannah Shaw Grove, published by Penton Media (2003). Used with permission. Invesco Distributors, Inc. is affiliated with none of these parties.

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