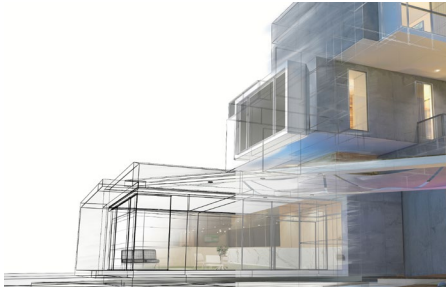


Building Opportunities

The compelling language of real estate investment trusts



How do you talk to clients about diversifying their portfolios beyond stocks and bonds with alternative investments like real estate investment trusts (REITs)? Use research-based language in order to help ensure your guidance is followed and valued.

Invesco Global Consulting (IGC) partnered with word specialist, Maslansky + Partners, to study the best language to use with accredited investors when introducing real estate investments. The research, part of the largest study ever done on the language of financial services,¹ used instant dial response technology to measure the emotional response investors had to communications.

The results showed that accredited investors are ready to talk to their financial professionals about REITs if it is communicated in the right way using the right words in the right order.

Skills to be developed from the presentation

Attendees are shown:

- A “3-Story Structure” to use in building the case for REITs
- Communication traps to avoid and truths to embrace
- Language shown to work when communicating seven core potential benefits of REITs
- “Words to use” and “words to lose”
- Conversation guides

Research highlights²

- While private investments may be exclusive and suitable only for accredited investors, clients prefer “inclusive” over “exclusive.” Less than one-third likes the idea of an “exclusive real estate investment.”
- Investors don’t want to profit “off the backs” of others. Only 23% liked a REIT that “enhanced returns by increasing rents,” whereas 77% liked a REIT that “enhanced returns by increasing property values.”

¹Study conducted by Invesco Global Consulting and Maslansky + Partners since 2007

²Source: 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).

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We're here to partner with you in every aspect of your practice so that you can focus on what matters most: Enhancing your business, connecting with your clients, and optimizing your portfolios.

01



Enhancing your business

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

- Comprehensive **practice diagnostics** and **peer benchmarking**, anchored by third-party research.
- Industry-leading business development and practice management **programs** and **tools**.
- **Business coaching** provided by our tenured, knowledgeable consultants.

02



Connecting with your clients

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

- Client **servicing and segmentation strategies**.
- **Proprietary research** and **client-facing scripts**, backed by the industry's most extensive studies on effective client language.
- **Client-facing tools** and **resources** to simplify investment insights and offer perspective on market conditions.

03



Optimizing your portfolios

Access expert guidance and a range of products that could help optimize your investment process and portfolio outcomes.

- Comprehensive, customized **portfolio consultations** and **analytical tools**.
- **600+ investment strategies** across asset classes and vehicles, as well as model portfolios, to support a full range of investment goals.
- Expert **investment insights** to help navigate markets.

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"Building Opportunities" is based on Invesco Global Consulting's work with Maslansky + Partners. Invesco Distributors, Inc. is not affiliated with Maslansky + Partners.

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This does not constitute a recommendation of any investment strategy or product for a particular investor. Investors should consult a financial professional before making any investment decisions.

Alternative products typically hold more non-traditional investments and employ more complex trading strategies, including hedging and leveraging through derivatives, short selling and opportunistic strategies that change with market conditions. Investors considering alternatives should be aware of their unique characteristics and additional risks from the strategies they use. Like all investments, performance will fluctuate. You can lose money.

Investments in real estate related instruments may be affected by economic, legal, or environmental factors that affect property values, rents or occupancies of real estate. Real estate companies, including REITs or similar structures, tend to be small- and mid-cap companies, and their shares may be more volatile and less liquid.

Although bonds generally present less short-term risk and volatility than stocks, the bond market is volatile and investing in bond funds involves interest rate risk; as interest rates rise, bond prices usually fall, and vice versa. Bond funds also entail issuer and counterparty credit risk, and the risk of default. Additionally, bond funds generally involve greater inflation risk than stocks.

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All data created and produced by Invesco Global Consulting unless otherwise noted.

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