

Your Prosperity Picture

Public Workshop

A 5-step system designed to help manage your money, design your life and create your future

Overview

Manage your money. Design your life. Create your future. According to a McKinsey study, women are increasingly serving as their family's breadwinners and are expected to control as much as \$30 trillion in US household financial assets by 2030.¹ "Your Prosperity Picture" seeks to help financial professionals build assets within this lucrative marketplace using an entertaining, interactive and inspirational approach rarely seen in the industry.

Attendees are invited to learn key steps to creating prosperity, participate in five interactive discussions, and work with a unique hands-on visualization tool built to help them connect their money with their lives. They leave armed with tools designed to enable them to reframe personal financial management as a powerful means to a desirable end and see their financial professionals as valuable partners in helping them get there.

Program Toolbox

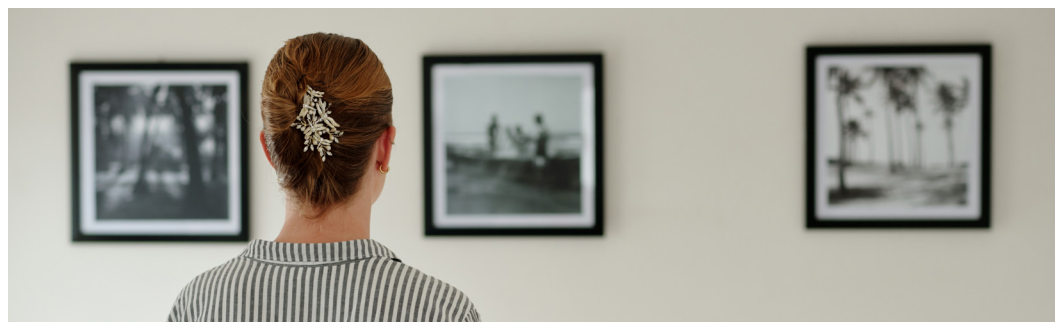
From principles to practice

"Your Prosperity Picture Public Workshop" includes the following components:

- PPT presentation and speakers notes²
- Attendee toolkit³
- Attendee "image packet" and picture frame⁴
- Attendee action step list⁵
- Workshop invitation⁶
- Workshop evaluation⁷

What financial professionals have said about "Your Prosperity Picture Public Workshop"

- "My team brought in several multi-million dollar relationships after our first 'Your Prosperity Picture workshop.' This was a fantastic event for our clients; the approach, content, and presentation were all terrific." – *Financial professional, Chicago Metro Area*
- "I got appointments from 50% of the 30 prospects in the room at my 'Your Prosperity Picture' event. I've gotten nothing but positive feedback, and the clients I've obtained from the workshop seem to be more focused on the big picture and retirement planning and less focused on product and performance." – *Financial professional, Austin, TX*
- "I've received numerous comments on how much everyone enjoyed 'Your Prosperity Picture.' It was absolutely the best workshop I have ever given or attended!" – *Financial professional, Maudlin, SC*
- "Clients love it! 'Your Prosperity Picture' definitely adds value to my existing client relationships; it causes them to think of their finances in a different way. One woman whom I've been trying to get as a client for two years came to the workshop and hired me afterwards! She said, 'It's because of this event that I want to work with you; you've helped me understand.'" – *Financial professional, Arvada, CO*



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-kind⁸ 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

¹Source: McKinsey PriceMetrix, 2019. PriceMetrix is an integrated data and business intelligence platform for the wealth management industry. This analysis includes US industry surveyed households with \$100,000 to \$10 million in personal investable assets. ²Ask your Invesco representative for IGC-YPP-PPT-1P. ³Ask your Invesco representative for IGC-YPP-BRO-1-E. ⁴Ask your Invesco representative for IGC-YPP-CRD-1 and IGC-YPP-FLY-3. ⁵Ask your Invesco representative for IGC-YPP-AP-FLY-1-E. ⁶Ask your Invesco representative for IGC-YPP-INV-1-E-FF. ⁷Ask your Invesco representative for IGC-YPP-FLY-2-E. ⁸Cerulli Associates. Used with permission. Invesco Distributors, Inc. is affiliated with neither Cerulli Associates nor Cerulli, Inc.

“Your Prosperity Picture” is based on Invesco Global Consulting’s work with Maslansky + Partners and Ellen Rogin, CPA, CFP®, wealth financial professional and Abundance Activist.™ Invesco Distributors, Inc. is affiliated with neither Maslansky + Partners nor Ellen Rogin.

Invesco Global Consulting programs are for illustrative, informational and educational purposes. We make no guarantee that participation in any programs or utilization of their content will result in increased business for any financial professional.

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.

The opinions expressed are those of the author and are subject to change without notice. These opinions may differ from those of other Invesco investment professionals.

All data created by Invesco Global Consulting unless otherwise noted.

Note: Not all products, materials or services available at all firms. Financial professionals should contact their home offices.

invesco.com/ic ©2024 Invesco Ltd. All rights reserved. IGC-YPPGEN-FCT-2-E 07/24 Invesco Distributors, Inc.

NA3738993

20240724-3738993-NA