



New Word Order

A Mutual Understanding

The top ten words to use and lose when discussing mutual funds with investors



A Mutual Understanding

Words to use and words to lose, based on the New Word Order research – five years, 15 dial sessions and the most recent national survey of 800 investors in March, 2011.

The Top Ten Words to Use

1. Financial Security

Which is more important to you today? Achieving...?

85% Financial Security
15% Financial Freedom

2. Portion

Thinking about the different types of products you can invest in today, if your financial advisor recommended you put [all/portion] of your portfolio into a single, well-diversified fund that seeks to maximize potential for growth, based on your personal risk comfort level, how likely would you be to do it?

92% Portion
50% All

3. Long-Term

And which of the following would you like to discuss with your advisor? Is it a(n) ... strategy?

75% Long-term
11% Opportunistic
7% Short-term
7% Recovery

4. Balance/UpSide Potential with Downside Protection

Which investment is most appealing to you? One that is designed...?

29% To balance risks
27% For upside potential with downside protection
19% To work in all market environments
15% To reduce downside risks
10% For equity-like returns with bond-like risks

5. Costs

Which of the following do you LEAST like to pay as an investor?

53% Fees
26% Commissions
15% Charges
6% Costs

6. Straightforward

When it comes to the costs of investing, what kind of fee arrangement would you prefer? One that is...

58% Straightforward
23% Clear
20% Transparent

7. Strategies

And which of the following do you most want to hear about from your financial advisor? Is it investment ...

40% Strategies
22% Solutions
21% Advice
17% Opportunities

8. Reliable

When it comes to talking with your financial advisor about CONSERVATIVE investments, do you most want to hear about a ... approach?

39% Reliable
31% Dependable
17% Safe
13% Risk-averaging

9. Diversified

When it comes to talking with your financial advisor about MODERATE investments, do you most want to hear about a ... approach?

42% Diversified
33% Balanced
13% Mixed-asset
12% Comprehensive

10. Progressive

When it comes to talking with your financial advisor about AGGRESSIVE investments, do you most want to hear about a(n) ... approach?

45% Progressive
29% Innovative
14% Cutting-edge
12% Alternative

The Top Ten Toxic Words and Phrases

Words to never use with today's investors

1. You Say:	Act Now
They Hear:	Implausible, improbable and possibly illegal
2. You Say:	New & Improved
They Hear:	Untested and unproven – would prefer something that works as advertised
3. You Say:	Trust Me
They Hear:	CAUTION! Everyone wants an advisor they can trust – no one wants an advisor who says “trust me”
4. You Say:	Automatic/Default
They Hear:	Loss of choice and control
5. You Say:	Longevity Risk
They Hear:	Isn't longevity a benefit and death a risk?
6. You Say:	Institutional Management
They Hear:	Felons are managing the money
7. You Say:	Outlive Your Money
They Hear:	You are scaring me into buying – would rather discuss having enough money for as long as I live
8. You Say:	Best-of-Breed, World Class Disciplined
They Hear:	Mind numbing and meaningless cliches – unless backed up with proof
9. You Say:	Beta
They Hear:	Getting in over my head – this is hard work and confusing
10. You Say:	Established in 1868
They Hear:	So was Lehman. You can't be too old to fail

**Invesco mutual fund profile sheets that resonate with today's investors.
Available from your Invesco representative.**

Contacts

For more information on Invesco mutual funds and the investor-friendly Invesco Profile Sheets that use the New Word Order language, contact your Invesco representative at the number listed below.

National Wirehouse	800-998-4246
Institutional and Insurance Sales.....	800-410-4246
Regional Broker Dealer	800-421-0807
Registered Investment Advisor.....	800-421-4023
Independent Advisor	800-337-4246
Client Services	800-959-4246
Retirement Division	800-370-1519



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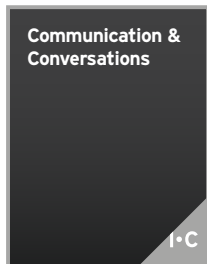
Keep



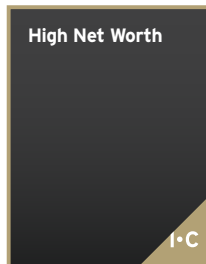
Grow

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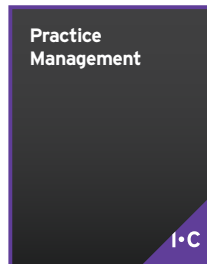
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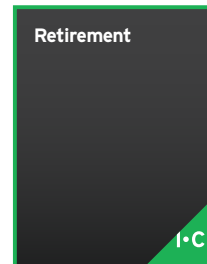
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Transforming your HNW business with client acquisition and retention strategies.



Maximizing your "return on effort" with best in class practice management techniques.



Navigating today's retirement of changing regulations, client conversations and investment opportunities.



Gaining a sharper perspective on global markets, economic trends and portfolio strategies.

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