

Word Card

Using the New Invesco Profile Sheets with Clients

Client Literature With Client Language

Invesco marketing applied the New Word Order research to the new mutual fund profile sheets, so that each sheet uses the communication principles, words and phrases that resonate with investors.

Diversified*

Which of the following describes the best strategy to you today? The one that is...

- 46% Diversified
- 14% Predictable
- 11% Disciplined
- 9% Not Correlated to the Market

Strategy*

Which do you most want to hear about from your Financial Advisor?

- 37% Investment Strategies
- 20% Investment Advice
- 11% Investment Opportunities
- 8% Investment Solutions

Long-Term*

Which type of strategy you would most like to hear about from your financial advisor?

- 26% Long term
- 10% Comprehensive
- 6% Progressive
- 4% Conservative

*Percentages based on the number of responses received for the word. In some cases totals will not equal 100% if investors registered no response to the word.

Phrases to Lose

- > For **ALL** your investment needs
- > Act **NOW**
- > **INSTITUTIONAL** management
- > Outlive your money
- > A **HOLISTIC** investment
- > Cautious or Optimistic

Phrases to Use

- > For a **PORTION** of your investment needs
- > Invest for the **LONG-TERM**
- > **KNOWLEDGEABLE** management
- > Have enough money for as long as you live
- > A **COMPREHENSIVE** investment
- > Cautious Optimism



In Other Words...

Which words work best with investors? Our March, 2009 survey of 800 investors revealed the answers.

- 57% Stocks
- 43% Equities
- 62% Companies
- 38% Securities
- 55% Bonds
- 45% Fixed Income
- 82% Diversified
- 18% Asset Allocation
- 65% Diversified
- 35% Balanced
- 27% Tax Deferred
- 25% Tax Exempt
- 25% Tax Free
- 23% Tax Advantaged
- 82% Money Markets
- 18% Cash
- 56% Dividends
- 44% Income
- 78% Portfolios
- 22% Trusts

Words That Resonate With Investors When Communicating About...

Portfolio Managers*

- 23% Knowledgeable
- 17% Accountable
- 16% Experienced
- 13% Responsible
- 9% Consistent
- 5% Tested
- 1% Unwavering

Equity Funds*

- 78% Traditional
- 22% Unique

Aggressive Investments*

- 38% Innovative
- 20% Alternative
- 17% Ambitious
- 16% Institutional
- 9% Unique

One of the few cases where "innovative" resonates with investors.

Moderate Investments*

- 28% Diversified
- 20% Balanced
- 20% Managed Risk
- 17% Well Informed
- 12% Responsible
- 3% Cautious

Conservative Investments*

- 20% Reliable
- 17% Dependable
- 13% Time Tested
- 8% Established
- 5% Prudent

Cash Investments*

- 38% Personal Reserve
- 27% Emergency
- 17% Contingency
- 9% Rainy Day
- 9% Backup

Invesco Sales Teams

Contact your Invesco sales representative for more information on the New Word Order and the new Invesco profile sheets.

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Source: ml + p and Invesco Van Kampen Consulting survey of 800 investors, March, 2009.

"New Word Order" is based on our firm's research with maslansky luntz + partners (2007-2009).



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