



## Invesco Private Wealth Program at a glance

Your hard work and diligent saving have earned you a higher standard of care. Invesco Private Wealth delivers greater value through preferred pricing and the power of tax-efficient investment options. With a minimum investment of \$100,000, the program is exclusively available to investors like you, who work with a financial advisor.

### Tiered Elevations

Invesco Private Wealth is available exclusively to investors like you, with a minimum of \$100,000 in assets. Linking your individual and family accounts on a household level<sup>†</sup> puts the program within reach. As your wealth grows, you move toward the next Elevation of Invesco Private Wealth.

Elevation <b>\$500K+</b>		
Elevation <b>\$250K</b>		
Elevation <b>\$100K</b>		
<b>Starting at \$100,000, members receive:</b> <ul style="list-style-type: none"><li>■ Preferred pricing</li><li>■ Household account linking</li><li>■ Tax-efficient investment options</li><li>■ Flexible, tax-efficient cash flow choices</li><li>■ Currency-hedged and U.S.-dollar options</li><li>■ Optional, customizable portfolio rebalancing</li><li>■ Dedicated online resources</li></ul>	<b>At \$250,000, members also receive:</b> <ul style="list-style-type: none"><li>■ Client welcome package</li><li>■ Year-end tax reporting package</li></ul>	<b>At \$500,000, members also receive:</b> <ul style="list-style-type: none"><li>■ Tiered management fee reductions at \$500,000, \$1 million and \$5 million</li></ul>

### The luxury of choice

Invesco Private Wealth gives you and your advisor the flexibility to choose the investment strategy that's right for your unique financial situation. Together, you can build a personalized portfolio of individual Trimark, Invesco and PowerShares strategies. Alternatively, the right choice may be one of our straightforward, yet sophisticated Invesco Intactive managed portfolios.



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## Preferred pricing

As an Invesco Private Wealth member, you benefit from preferred pricing not available to most retail investors. At \$100,000 you get an immediate cost reduction,<sup>†</sup> with additional tiered management fee reductions starting at \$500,000 in qualifying assets. Over time, lower management costs can help you grow your wealth more quickly.

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## The power of tax efficiency

Like many of your peers, you may have accumulated more wealth than can be effectively sheltered within registered accounts. This creates a unique need for more tax-efficient investment options. Invesco Private Wealth offers strategies that provide:

- Tax-efficient portfolio construction options
- Tax-efficient portfolio rebalancing
- The potential for tax-deferred growth
- Tax-efficient monthly cash flow options

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## Dedicated support and resources

Invesco Private Wealth provides the elevated experience that you expect. Benefits include:

- Detailed quarterly account statements
- Dedicated online resources
- Optional, custom portfolio rebalancing

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To learn more about your benefits as a member, visit [www.invesco.ca](http://www.invesco.ca).

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Commissions, trailing commissions, management fees and expenses may all be associated with mutual fund investments. Mutual funds are not guaranteed, their values change frequently and past performance may not be repeated. Please read the simplified prospectus before investing. Copies are available from your advisor or Invesco Canada Ltd.

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<sup>†</sup>To take advantage of reduced management fees in the Private Investor series of Invesco Canada funds, investor(s) must hold a minimum of \$100,000 in shares or units of any Invesco Canada Fund(s), aggregated across their personal accounts or within the same financial/household group of accounts. A financial/household group may include accounts held by a single investor, their spouse, family members residing at the same address, as well as corporate accounts for which the investor or other member of the financial/household group beneficially own more than 50% of the voting equity. For more details, please see the Invesco Simplified Prospectus.

Invesco is a registered business name of Invesco Canada Ltd.

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Published on November 22, 2013

ISPWIPE(11/13)