The Golden Hour

It's not the clients you win; it's the clients you keep

Built to be an effective and implementable client retention model

Losing a top client is never a pleasant experience. Worse still, research shows that 72.2%[1] of financial professionals lose one top client per year. This makes everyone have to run harder just to maintain present production levels, and it hamstrings organic growth. However, we have seen that it does not have to be this way and that it can be surprisingly simple and easy to maintain top clients—the very clients that form the foundations of the viability of financial professionals' businesses. In fact, by breaking one bad habit and making another, we have seen that financial professionals can easily maintain client relationships for their careers. It has been our observation that most client retention models are so intensive and time-consuming as to prevent most financial professionals from ever using them. "The Golden Hour" model aims to deliver maximum benefit at a truly implementable level.

Program Toolbox

From principles to practice:

- Keynote presentation[2]
- Toolkit[3]:
  - Implementation self guide
  - Client segmentation coaching
  - Conversation guides

Based on

- Invesco Global Consulting's work with Maslansky + Partners, R.A. Prince & Associates, Inc, and Cerulli Associates.

[1] Source: Study of 405 financial professionals, as conducted by R.A. Prince & Associates, Inc. under proprietary contract of Invesco Global Consulting during the second half of 2015. Used with permission.

[2] IGC-TGH-PPT-1I

[3] IGC-TGH-BRO-1-E

[4] Source: Study of 213 affluent investors with >$1M in investable assets, conducted by R.A. Prince & Associates, Inc. under proprietary contract of Invesco Global Consulting during the fourth quarter of 2016. Used with permission. Contact = any form of interactive contact including telephone interactions, in-person meetings, text messages and/or email exchanges.

Research highlights

- 22.8% of clients deemed "top" or "Anchor" clients by financial professionals were said to provide the majority of their incomes.[1]
- 72.2% of financial professionals lose one of these top clients each year, and 61.3% of those financial professionals were "surprised" by the departure.[1] They could not see it coming.
- Here's the good news: Our research shows 4+ personal contacts per year are enough to stop these client losses.[4] The key here is personal; the personal touch is the golden touch. "The Golden Hour" aims to provide an impactful and efficient methodology to get this done.

Invesco Total CX

Invesco Total CX — the Total Client Experience™ — is a powerful platform and partnership with the 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-kind[1] 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
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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

[1]Source: Cerulli Associates. Used with permission. Invesco Distributors, Inc. is affiliated with neither Cerulli Associates nor Cerulli, Inc.
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