
THE *INVESCO* Alternative

Dedicated to helping you ...

... Achieve Financial Independence

Number 166 Wealth Management - Estate Planning - IRA's August 24, 2012

Registered Investment Advisors - Certified Public Accountants - Real Estate Brokers
INVESCO, LLC - 1295 Rand Road, Des Plaines, Illinois, 60016 - (847) 824-4078

Retirement Account Bonus

Do you have a 401(k), IRA or similar account that is not already at Charles Schwab & Co., Inc.? Schwab is having a "bonus promotion": If you roll your account to Schwab before September 28, they will pay you a cash bonus:

\$200 for a \$50,000 account
\$300 for a \$100,000 account
\$600 for a \$250,000 account

The limit is two accounts per person, so a \$600,000 account could be rolled to two Schwab accounts for two separate \$600 bonuses - limit two per person.

You can, after October 31, have us manage the rollover account. We will match Schwab's offer, giving you double bonuses. Our bonuses also apply to non-IRA accounts.

So, if you've been meaning to transfer an account to *INVESCO* management, now is the time to do it. Call Keith now and stop by for lunch!

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