
THE *INVESCO* Alternative

Dedicated to helping you ...
... Achieve Financial Independence

Number 147

Asset Management · Estate Planning · IRA's

September 6, 2009

INVESCO - 1295 Rand Road, Des Plaines, Illinois, 60016 (847) 824-4078

Save Hundreds Of \$\$\$

Have you been considering a separately managed account by *INVESCO*, custodied at Charles Schwab? Now is the time to act, while Schwab has a special offer going:

There's never been a better time for your friends and family to "Make the Move."

Our firm welcomes client referrals with a special limited-time offer from Charles Schwab & Co., Inc. ("Schwab"), your friends and family can make the transition to our firm seamlessly and cost-effectively. Schwab is helping reduce the cost of transferring assets to our firm's management by reimbursing transfer fees and waiving commissions on electronic equity trades through June 30, 2010 for new-to-Schwab clients who open an account by December 31, 2009. We can apply the commission-free electronic equity trades to invest cash or more economically rebalance the portfolio if needed.

If you know someone who may benefit from our firm's services, please have them give us a call at (847) 824-4078.

Schwab Advisor Services (formerly Schwab Institutional) is a business segment of The Charles Schwab Corporation serving independent investment advisors and includes the custody, trading and support services of Charles Schwab & Co., Inc. ("Schwab"). Independent investment advisors are not owned, affiliated with or supervised by Schwab.

FREE commissions through June 30, 2010! Plus up to \$200 of any charges your current custodian might claim for moving your account. This offer applies to IRA's, ROTH's, 401(k)'s, 403(b)'s, annuities and trusts as well as to brokerage accounts. Save several hundred dollars!

And, in addition, *INVESCO*, LLC is offering a three-month **FREE** get-acquainted program - **NO FEES** for the first three months of management. Save hundreds more! There is no obligation to continue with either Charles Schwab or *INVESCO* after the free offers expire.

Those who have an interest in this **FREE** program are invited to a brief dinner presentation at the Silver Stallion restaurant in Des Plaines. Current clients who bring a friend who might like to take advantage of this joint offering are also invited. Call Bev at (847) 824-4078 for more information on the dinner and to make your reservation.

Tax Free is Better Than Tax Deferred

The ROTH IRA is your weapon in the war on taxes. You don't get a tax deduction when you put money in, but the money in your account grows tax-free; as are future withdrawals after age 59-1/2. Starting in 2010, anyone can convert existing IRA's into ROTH accounts and delay the taxes to 2011 and 2012. Advantages of ROTHs include no required minimum distributions at age 70-1/2, like regular IRA's, and tax-free transfer to your heirs upon your death. You can also make a contribution to a regular IRA for 2009 and Roth it in 2010.

INVESCO, LLC

1295 Rand Road
Des Plaines, IL 60016

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