



**ONE** ADVISOR FOR LIFE

**invesco**

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EasySTEPS



EasySTEPS WILL  
ENABLE EMPLOYERS TO  
SIGNIFICANTLY ENHANCE  
THEIR PENSION OFFERING  
TO EMPLOYEES

## INTRODUCTION

# EasySTEPS FOR INVESCO CLIENTS

Since 1991 Invesco has earned an enviable reputation for service excellence, not just among clients, but also among our peers.

In addition to the bright minds within the company, Invesco's technological innovations have consistently led the Irish market. With our own sector-leading technology now further enhanced by Irish Life's global knowledge, expertise and innovations, the future looks very good.

Following a recent strategic review, we have future-proofed our services, optimising their capabilities within what is an increasingly complex legislative environment.

Those services are based on a combination of cutting edge technology and motivated personnel. Key among them is our Defined Contribution (DC) proposition whose market-leading elements, we believe, provide a strong foundation for an Advisory-led DC offering. **EasySTEPS** will enable employers to significantly enhance their pension offering to employees.

EasySTEPS  
TOOLKIT NOW  
INCLUDES

AN ADVISORY SERVICE  
BUILT FOR A CLIENT  
OF **ONE**



# one advisor for life

'One Advisor For Life' is a bespoke advisory service built around the specific needs of an individual member. Whether you are a trustee, an employer, or a member of a scheme, our advisors will develop a strategy built around your particular needs. Our deep knowledge of all aspects of pensions enables us to provide guidance to everyone, from a board of trustees wishing to be compliant with domestic legislation and EU Directives, to an individual scheme member seeking a personalised retirement strategy.

# investments

Trustees can now choose an Advisory-led investment service, or a Delegated Investment solution. Invesco's recommended investment platform offers security to trustees through its AA rating, while reassuring any members with same-day trades, by eliminating out-of-market exposure on fund switches.

## ADVISORY APPROACH

- Trustees and Invesco determine funds' compositions
- Reflected within bespoke/white labelled funds
- Domestic and International Investment Managers
- With Invesco providing portfolio analysis and insights



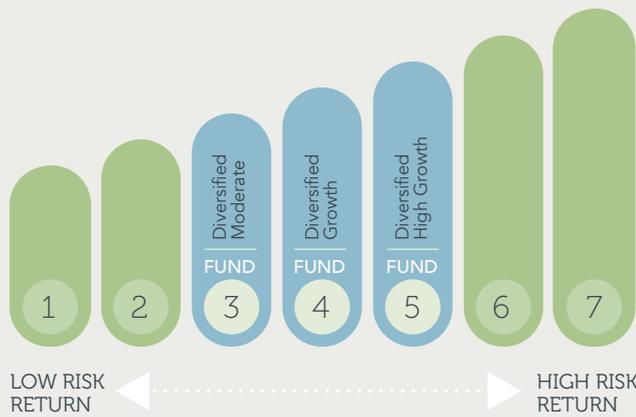
## DELEGATED APPROACH

- Built by our Client Solutions Team
- Be My Guide: Risk Profiled Model Portfolios
- I'll Decide: Self Build Tool Kits
- STEPS: Multiple Lifestyle Strategies
- Ongoing review and oversight by Invesco



# OUR DELEGATED SOLUTION INCLUDES

## RISK PROFILED MODEL PORTFOLIOS



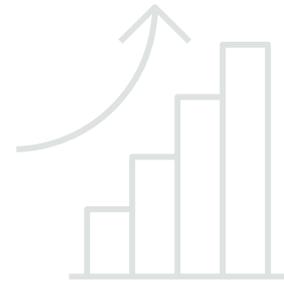
THE INVESCO INVESTMENT PROCESS



SPECIALISTS MANAGERS  
TO FACILITATE THE  
HANDS-ON MEMBER



# financial planning



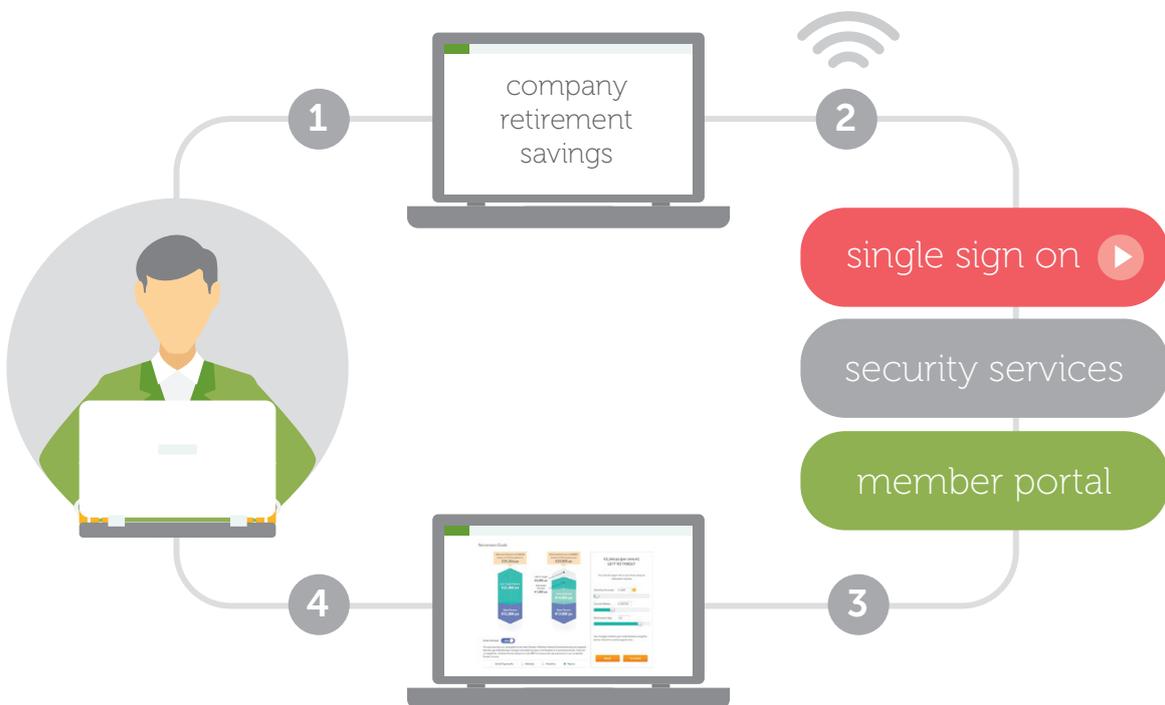
Our Financial Planning Advisory Service provides your members with comprehensive and personalised financial strategies, for all life stages.



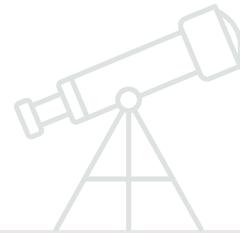
# single sign on



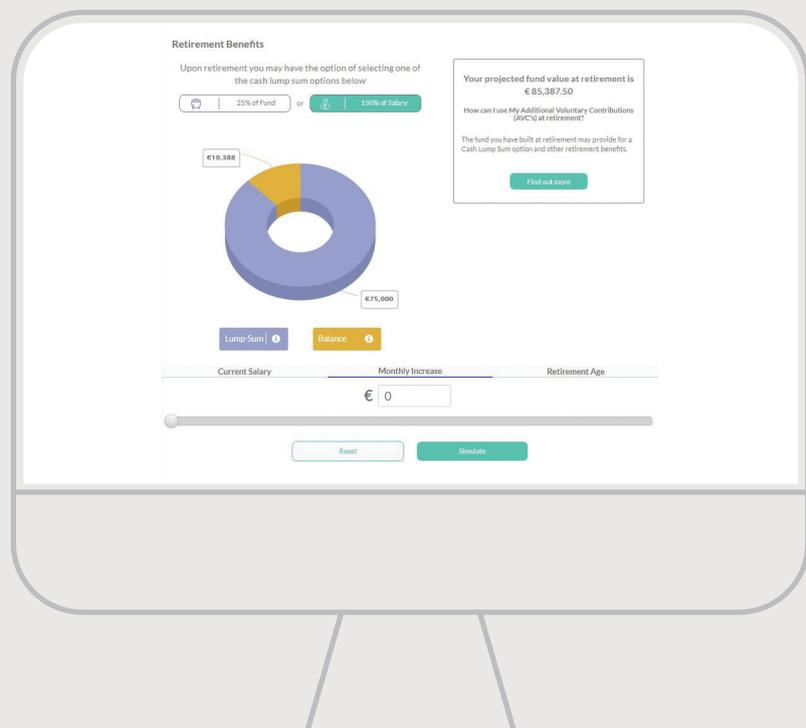
Invesco can operate a single sign-on facility, linking employers' internal websites with our member portal. This allows employers to link all employee benefits in one place.



# customer focused technology



EasySTEPS offers a host of member-focused features. The Forecast tool, for example, outlines likely benefit outcomes on retirement, in a clear, simple, easy to navigate application.



# new style benefit statement

We are redesigning and refreshing our benefit statements. The new, full colour statements will include cleaner layout and fresher images, making them more engaging and even clearer to follow.



TECHNOLOGY  
AND PEOPLE



EFFECTIVE INVESTMENT  
STRATEGY



GUIDANCE NEEDED TO BUILD  
A PENSION STRATEGY

# why EasySTEPS?

Invesco's **EasySTEPS** approach has both the technology and people to deliver the best outcomes, whatever position you hold in the process. For boards of trustees **EasySTEPS** offers everything required to develop an effective investment strategy, tailored to member needs. For individual members of a retirement fund, **EasySTEPS** offers the guidance needed to build a pension strategy, both before and following the retirement date.

# how can we help?



SERVICE	HERE ARE SOME OF THE WAYS WE CAN HELP.
ADVISORY	<ul style="list-style-type: none"> <li>• Map out the likely benefit outcomes for your members and benchmark against expectations</li> <li>• Independently review your group risk arrangements</li> <li>• Review your readiness for IORP II, ECB AND EIOPA reporting structures</li> </ul>
INVESTMENT	<ul style="list-style-type: none"> <li>• Review your current strategy and benchmark to best practice</li> <li>• Develop scheme-specific investment strategy</li> <li>• Make investments easier for members to understand</li> </ul>
FINANCIAL PLANNING	<ul style="list-style-type: none"> <li>• Develop a readiness program for your members</li> <li>• Provide your members with personalised forecast and likely benefit outcomes facilities</li> </ul>
ACCESS	<ul style="list-style-type: none"> <li>• Provide your members with easy access to information across multiple devices in an easily understood language</li> </ul>
GOVERNANCE	<ul style="list-style-type: none"> <li>• Review your scheme's governance structures against regulatory best practise</li> </ul>



# contact us

WE WOULD WELCOME  
THE OPPORTUNITY  
TO SHARE OUR  
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