

# ATLANTIC TRUST

PRIVATE WEALTH MANAGEMENT

## Press Release

FOR IMMEDIATE RELEASE

### **Atlantic Trust Achieves 16 Consecutive Quarters of Growth Strong Client Retention, Steady Additions & New Business Across U.S.**

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**ATLANTA, May 2, 2011**—Atlantic Trust, the private wealth management division of Invesco Ltd. (NYSE: IVZ), announced today that the firm has achieved 16 consecutive quarters of positive net flows. Several factors have contributed to this success, including strong client retention and a steady inflow of assets from existing clients and new client relationships.

“Atlantic Trust’s accelerating growth in the aftermath of the worst global financial crisis in 80 years is a direct result of our ongoing dedication to providing investment excellence and superior service to our clients,” said Jack Markwalter, Chairman and CEO. “The vast majority of our new business is referred to us by our clients and friends of the firm, which further validates our philosophy and platform. We remain committed to keeping our clients’ interests at the center of all we do and to acting as fiduciaries on their behalf.”

The firm has achieved record growth in regions throughout the U.S., most notably – New England, New York, the Mid-Atlantic, Texas and the Pacific Southwest.

Atlantic Trust’s Boston office has been working with a number of new clients as wealth passes through multi-generational families and the firm’s planning capabilities are needed. In New York, many entrepreneurs who have sold their businesses have come to Atlantic Trust for our comprehensive, holistic wealth management. The strength of the governmental sector has generated an inflow of new business in Washington, D.C., and the boom in the energy patch in Texas has led to opportunities as clients monetize some of their natural resource holdings. Heading farther West, the economy in the Pacific Southwest is robust and Atlantic Trust’s platform has attracted a number of new clients as the firm grows its presence there.

“Affluent individuals and families are very discerning about the types of services they are receiving from their financial advisors,” noted Eric Propper, president & COO. “Atlantic Trust provides an objective platform, which instills a sense of confidence in these clients. After the turmoil of recent years, our constant focus – on building relationships of trust, responsibly managing clients’ assets and helping clients leave a legacy – has new significance in our industry.”

Atlantic Trust's positive momentum is visible across the business. Since January 2010, the firm has made 15 senior hires across the U.S., most recently in Chicago and San Francisco with active searches for senior talent currently underway in Houston and Boston. Also, during this period, the firm's senior management team and investment and wealth planning experts have traveled to 20 major cities across the U.S. to host 35 speaker series events.

More than 40 educational speaker series events in 32 cities are planned for 2011. *Private Asset Management* magazine recently recognized Atlantic Trust as the "Best Wealth Management Firm in Overall Client Service" for firms with more than \$5 billion in assets under management.

Note: All data as of March 31, 2011

Information: Of the five firms shortlisted for the PAM rating, Atlantic Trust was the only firm selected for the award. This rating may not be representative of any one client's experience, because the rating reflects an average or all, or a sample or all, of the experiences of Atlantic Trust's clients. Any reference to a ranking, a rating or an award provides no guarantee for future performance results and is not constant over time.

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### **About Atlantic Trust**

Atlantic Trust is one of the nation's leading private wealth management firms, offering integrated wealth management for high net worth individuals, families, foundations and endowments. The firm considers clients' financial, trust, estate planning and philanthropic needs in developing customized asset allocation and investment management solutions. Experienced professionals deliver a broad range of offerings, including proprietary investment offerings and a robust open architecture platform of traditional and alternative managers. Atlantic Trust operates in 11 full-service locations throughout the U.S. With approximately \$17.5 billion in assets under management (as of March 31, 2011), Atlantic Trust is the private wealth management division of Invesco Ltd. (NYSE: IVZ). For more information, visit [www.atlantictrust.com](http://www.atlantictrust.com).

### **About Invesco**

Invesco is a leading independent global investment manager dedicated to helping investors worldwide achieve their financial objectives. By delivering the combined power of our distinctive investment management capabilities, Invesco provides a wide range of investment strategies and vehicles to our retail, institutional and high net worth clients around the world. Operating in more than 20 countries, the company is listed on the New York Stock Exchange under the symbol IVZ.

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