



**Contact:**

Jeaneen Terrio

Invesco

(212) 278-9205

[Jeaneen.terrio@invesco.com](mailto:Jeaneen.terrio@invesco.com)

**Jemstep Partners with SSG to offer Advisor Pro Platform to over 1,500 RIA Client Firms**

February 16, 2017 –Atlanta, GA– Invesco (NYSE: IVZ) today announced that Jemstep, Inc., Invesco’s digital advice platform, is partnering with Shareholders Service Group (SSG), a brokerage and custodial services firm that works exclusively with independent registered investment advisors. Jemstep Advisor Pro will be made available in Q1 2017 to more than fifteen hundred independent RIA client firms who do business with SSG.

Jemstep Advisor Pro combines market-leading client engagement, onboarding and servicing technology and industry-leading investment management capabilities to deliver a comprehensive digital advice solution for advisory firms and their advisors and clients. This combination creates a powerful way for advisory firms to engage and efficiently serve their clients with a convenient, user-friendly online experience that can be configured to reflect each firm’s unique value proposition. Firms can utilize their own portfolio models on the Advisor Pro platform or leverage the expertise of Invesco’s investment solutions.

“SSG focuses on providing world-class service and technology to independent RIA firms and their clients. We believe that Jemstep’s market-leading technology combined with Invesco’s history of delivering investment solutions will help RIAs to grow their practices efficiently while improving their ability to serve their clients. We are excited about working closely with Jemstep and Invesco on this initiative,” said Dan Skiles, President of SSG.

“We are very pleased to be partnering with SSG to become a key component of their existing high service value proposition,” said Simon Roy, President of Jemstep. “We have worked closely with SSG and their clearing and custody partner, Pershing, LLC, to seamlessly integrate our client onboarding and servicing flows. Independent RIA firms who work with SSG will benefit from greater efficiency and effectiveness in growing their client base and serving client needs.”

Jemstep Advisor Pro is open architecture, providing access to a variety of professionally-selected mutual fund and ETF investment options. The platform offers enhanced portfolio management services, insights to help manage risk, and an opportunity for investment advisors to broaden their client reach and address intergenerational needs.

#### **About Shareholders Service Group**

Shareholders Service Group (SSG), [www.ssginstitutional.com](http://www.ssginstitutional.com), provides brokerage and custodial services exclusively for independent registered investment advisors (RIAs). SSG provides a full range of brokerage and back office service and support with a robust technology platform, access to a full suite of investment vehicles, and a highly experienced service team that only serves independent RIAs. The company was founded in 2002, and currently serves over 1,500 advisory firms throughout the country. The management team began serving independent RIAs in the late 1980s.

#### **About Invesco**

Invesco is an independent investment management firm dedicated to delivering an investment experience that helps people get more out of life. NYSE: IVZ; [www.invesco.com](http://www.invesco.com)

#### **About Jemstep**

Jemstep is a market-leading provider of financial advisor-focused digital solutions. Established in 2008, it was one of the first digital platforms to focus on helping advisors deliver professional advice to their clients online. The award winning Jemstep Advisor Pro platform helps advisors scale their business efficiently by providing a full suite of highly flexible technology solutions that can be easily integrated into existing systems and business models. Invesco acquired Jemstep in January 2016.

###

**Jemstep**  
by Invesco

