

# ATLANTIC TRUST

PRIVATE WEALTH MANAGEMENT



## WINNER

Private client investment  
platform - performance  
**Atlantic Trust**



**Press Release**  
**FOR IMMEDIATE RELEASE**

## **Atlantic Trust Recognized as Industry Leader for Private Client Investment Platform**

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**ATLANTA, March 7, 2012** — Atlantic Trust, the private wealth management division of Invesco Ltd. (NYSE: IVZ), has been recognized by *Private Asset Management (PAM)*, a financial services industry trade publication, as having the **Best Private Client Investment Platform–Performance** among firms with more than \$5 billion in assets under management (AUM). The 2012 PAM Awards were announced recently at a ceremony in New York.

“This award is a significant accomplishment and reflects Atlantic Trust’s unwavering commitment to investment excellence,” said Jack Markwalter, chairman and CEO of Atlantic Trust. “We manage strategies on a proprietary basis where we have a competitive track record, and we also search globally for institutional-quality, external portfolio managers with strong, risk-adjusted returns.”

“Our investment philosophy is centered on the idea that the best way to help families preserve and grow their wealth is through global diversification among asset classes and investment strategies,” said David Donabedian, CFA, chief investment officer of Atlantic Trust. “To achieve these results, we have designed a disciplined asset allocation process and hybrid investment model that combines proprietary and external investment offerings. Because we’ve used this approach for decades, we have an experience edge that gives our clients outstanding access to leading investment managers in all asset classes.”

PAM annually invites firms to compete for awards in several categories, and then a panel of independent industry experts selects the nominees and winners. PAM says that it considers the following criteria when selecting the winners of these awards:

- **Financial progress:** candidates must be able to demonstrate performance track-records over the course of the last twelve months
- **Growth:** client numbers, internal hires and geographic expansion
- **Client satisfaction:** provide evidence of client satisfaction, including anecdotes and direct client statements
- **Product innovation:** details of new services and products launched over the course of 2011

This recognition builds on the strong momentum Atlantic Trust brings into 2012, following a year of national recognition, including the firm's 2011 PAM win as **Best Private Wealth Manager in Overall Client Service** and recognition as the **Top U.S. Wealth Management Firm** by The Luxury Institute.

Any reference to a ranking, a rating or an award provides no guarantee of future performance results, and is not necessarily indicative of any particular client's experience and is not constant over time. In 2012, Atlantic Trust was selected by PAM for the award of "Best Private Client Investment Platform – Performance" based on information provided by Atlantic Trust. 10 firms entered the category for this award and 4 firms were shortlisted, of which Atlantic Trust was the only firm selected for the award. The specific criteria PAM used to determine the award is considered proprietary and could not be obtained. In response to PAM's question about "how [we] have developed our [investment] offering in 2011" regarding "product innovation, performance and how [we] dealt with the challenges of the last year," Atlantic Trust provided an overview of our investment approach and recent asset allocation recommendations, as well as highlights of proprietary performance. Atlantic Trust provided detailed performance information for the Atlantic Trust Disciplined Equity Strategy. Atlantic Trust did not provide detailed performance information with respect to the more than 50 other proprietary and externally managed strategies available on our platform. Thus, the reference to "investment platform – performance" in the award should not be misconstrued as suggesting that PAM conducted a comprehensive review and analysis of the performance of all of the strategies on our platform.

In 2011, of the five firms shortlisted by PAM for the "Best Private Wealth Manager in Overall Client Service" rating, Atlantic Trust was the only firm selected for the award. For more information, visit [www.pammagazine.com](http://www.pammagazine.com). In 2011, The Luxury Institute, a New York-based research firm, conducted research among 500 pentamillionaires (defined as wealthy consumers with a minimum annual income of \$200,000 along with a minimum net worth of \$5 million) about their opinions of luxury brands

The Luxury Institute ranked Atlantic Trust No. 1 among 35 private wealth management firms based on quality, exclusivity, social status and self-enhancement with an LBSI score of 6.96 out of a maximum possible 10. Sample base: Wealthy Consumers familiar with each firm. For more information, visit [www.luxuryinstitute.com](http://www.luxuryinstitute.com).

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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 \$18.0 billion in assets under management (as of December 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 Ltd.**

Invesco Ltd. is a leading, independent, global investment management firm 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 firm is listed on the New York Stock Exchange under the symbol IVZ.

Investment Products offered are not FDIC Insured, May Lose Value and are not bank guaranteed.

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