

Financial advice *for life*

For 130 years, Ameriprise Financial has been dedicated to helping people achieve their short-term and long-term goals. We are a trusted financial firm and longstanding leader in financial planning and advice.



Clients rate
Ameriprise advisors

4.9/5

in overall
satisfaction¹

Top ratings in the investment industry



Recognized by *Forbes* as one of
America's Best Companies 2025²



Named one of **America's Most Responsible Companies 2025**
by Newsweek³

Hearts&Wallets
The source for retail investor data & insights

Earned a 2024 Hearts & Wallets
Top Performer™ recognition
in **"Understands me and shares my values"** for the sixth time⁴

Our commitments to you



1:1 financial advice
based on your goals and needs



Personalized recommendations
for a diversified portfolio, and solutions
to help prepare for uncertainty



Regular meetings
to review your goals, progress and
investments



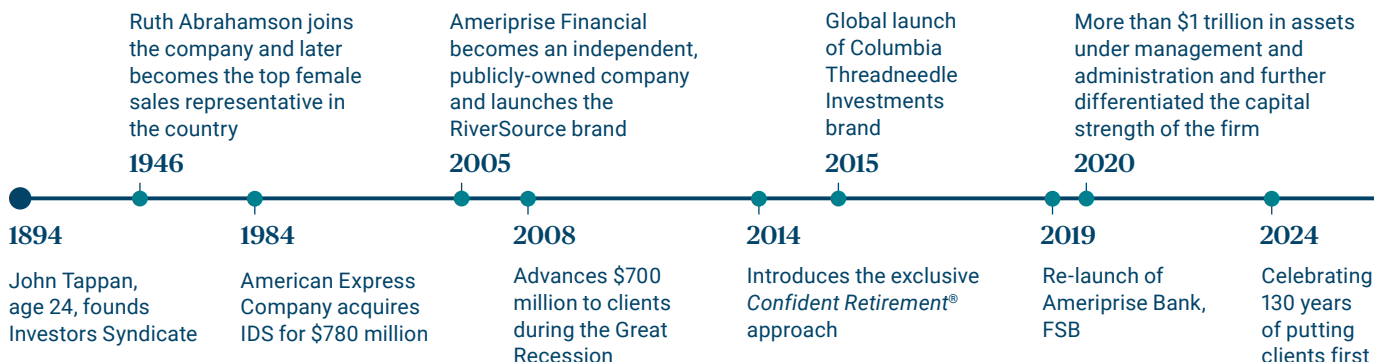
Anytime access
to your investments and digital tools
to help you stay on track

Experience you can count on

- Serving more than **3.5 million individual**, business and institutional clients⁵
- Working with more than **10,000 financial advisors** serving clients in the U.S.⁶
- Having more than **1.4 trillion** in assets under management, administration and advisement⁶
- Ranking as the **#24 largest global asset manager**⁷

Our history

Since 1894, we have helped empower millions of people to pursue their passions, protect what matters most and live their values.



¹ Ameriprise created the Client Experience Survey to give clients an opportunity to rate their satisfaction with their assigned financial advisor or advisor team using a scale of 1 to 5. Each client has an opportunity to access the Ameriprise Secure Client Site and provide a rating. This client satisfaction score is a national average of client responses for all advisors and teams within a rolling 24-month period as of 12/31/2024. Client experiences may vary, and working with any Ameriprise advisor or team is not a guarantee of future financial results. Investors should not consider the Client Experience Survey score a substitute for their own research and evaluation of an advisor's or team's qualifications.

² Forbes recognized America's Best Companies 2025 based on an evaluation of more than 2,000 U.S. headquartered public companies across 11 categories: employee and customer sentiment, financial strength, DEI, cybersecurity, media sentiment, public trust, sustainability, remote work policies, workforce stability, and accessibility policies/performance. The top 300 companies were included in the final list. Ameriprise did not pay a fee to be evaluated for this ranking. Ameriprise did pay a licensing fee to promote their appearance on the ranking. Find more information at <https://www.forbes.com/sites/alanschwarz/2024/10/17/americas-best-companies-2025-methodology/>.

³ Newsweek partnered with Statista to recognize America's Most Responsible Companies — U.S. companies that show a strong commitment to corporate social responsibility (CSR) in environmental, social and governance (ESG) factors. Statista conducted an analysis of quantitative data from more than 30 KPIs related to ESG, as well as a survey among more than 26,000 U.S. residents from Aug. 31 to Sept. 26, 2024. Survey respondents evaluated CSR performance for companies that were familiar to them. Ameriprise did not pay a fee to be evaluated for this rating. Ameriprise did pay a fee to publicly cite the results of the survey. Find more information at <https://www.newsweek.com/rankings/americas-most-responsible-companies-2025>.

⁴ This recognition is from the 2024 Wants & Pricing Report from the Hearts & Wallets Investor Quantitative™ Database. In the annual syndicated survey, respondents rate their financial services providers in various areas on a scale of 0 (not at all satisfied) to 10 (extremely satisfied). The 2023 Investor Quantitative™ Database was fielded September 11– October 6, 2023, to 5,846 respondents in 36 quota cells (age, asset groups and gender) and weighted back to national representation based on age and assets using 144 age-asset weighting cells (6 age ranges and 24 asset ranges) drawn from the most recent Federal Reserve Survey of Consumer Finances and Hearts & Wallets analysis. Sampling error is a function of sample size and response rate. At the national level, responses selected by 30% of households have a sampling error of +/- 0.8 ppts and +/- 1.2 ppts at 80% and 95% certainty, respectively. The report designates Top Performers in areas where customer ratings are "distinctively higher than customer ratings of other providers" — meaning one or more providers achieved customer satisfaction that exceeds other providers. For each area, there may be multiple Top Performers or none. The analysis does not rank Top Performers. It is not indicative of future performance or representative of any one client's experience. This is also the sixth time Ameriprise has earned a Top Performer recognition in "Understands me and shares my values" based on data from 2016, 2017, 2018, 2019, 2022 and 2023. Ameriprise did not pay a fee to be evaluated in the study but did pay a fee to Hearts & Wallets to cite the results.

⁵ Company reports.

⁶ Ameriprise Financial Q4 2024 Earnings Release.

⁷ Pensions & Investments/Thinking Ahead Institute World 500: World's largest money managers. Data as of Dec. 31, 2024.

The *Confident Retirement*[®] approach is not indicative nor a guarantee of future financial results.

Ameriprise Financial cannot guarantee future financial results.

Diversification does not assure a profit or protect against loss.

Investment products are not insured by the FDIC, NCUA or any federal agency, are not deposits or obligations of, or guaranteed by any financial institution, and involve investment risks including possible loss of principal and fluctuation in value.

Investment advisory products and services are made available through Ameriprise Financial Services, LLC, a registered investment adviser.

Securities offered by Ameriprise Financial Services, LLC. Member FINRA and SIPC.