

Financial advice for life

For over 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 2026**²



Named one of **TIME's
America's Most Iconic
Companies of 2026**³



Earned a 2025 Hearts & Wallets
Top Performer™ recognition
in **"Understands me and shares
my values"** for the seventh time⁴

Our commitments to you



Meaningful connections
to regularly discuss your goals,
life events, investments, milestones
and ever-changing needs



**Personalized investments and
solutions**
based on your needs to help
you plan for your financial goals
and objectives



Financial advice for a lifetime
based on your goals, now and
at every stage in your life



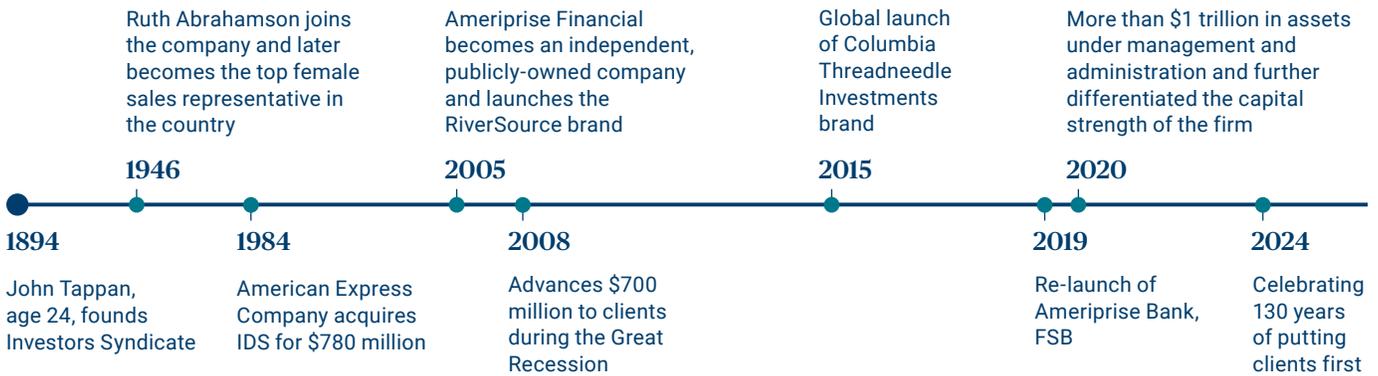
Secure digital access
to collaborate with us and access
your accounts anytime, anywhere,
from any advice

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 **1.7 trillion** in assets under management, administration and advisement⁷
- Ranking as the **#25th largest global asset manager**⁸

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. Clients of financial advisors in the Ameriprise Franchise Group, Ameriprise Advisor Group, and the Ameriprise Financial Institutions Group have 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 12/31/2025. 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 based on an evaluation of U.S. headquartered companies across 11 categories: employee and customer sentiment, financial performance, business trajectory, cybersecurity, media sentiment, workforce diversity, sustainability, workforce stability and company size. The top 500 companies were included in the final list. Ameriprise did not pay a fee to be evaluated, but did pay a fee to publicly cite the results. Find more information at <https://www.forbes.com/lists/best-companies/>.

³ TIME magazine partnered with Statista to recognize America's Most Iconic Companies, chosen based on an independent survey of roughly 10,000 participants. Ameriprise Financial, Inc. was the highest ranked diversified financial services firm in the ranking and its overall ranking was #48 out of 250 companies across all industry sectors. Eligible companies (founded and headquartered in the United States, with a market presence of at least 10 years.) were evaluated from July to August 2025, across several key categories: Recognition and familiarity, cultural significance and impact, emotional connection, resilience, Americanness, presence and legacy. Ameriprise did not pay a fee to be evaluated, but did pay a fee to publicly cite the results. Find more information at <https://time.com/7339929/americas-most-iconic-companies/>.

⁴ 2025 Wants & Pricing Report from the Hearts & Wallets Investor Quantitative™ Database. Between July 17 – August 9, 2024, 5,989 respondents provided 18,066 sets of ratings for their financial services providers in various areas on a scale of 0 (not at all satisfied) to 10 (extremely satisfied). The report designates Top Performers in areas where customer ratings are distinctively higher than the national average – meaning ratings exceeded the average by more than 20% or at least 120 points on an index. There may be multiple Top Performers or none, and Top Performers are not ranked. These results are not indicative of future performance or representative of any one client's experience.

Ameriprise has earned a Top Performer recognition in "Understands me and shares my values" seven times based on data from 2016-2019 and 2022-2024. 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 2024 10-K.

⁷ Ameriprise Financial Q4 2025 Earnings Release.

⁸ Pensions & Investments/Thinking Ahead Institute World 500: World's largest money managers. Data as of Dec. 31, 2024.

Ameriprise Financial cannot guarantee future financial results.

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.

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