

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 as
#1 among wealth managers
Kiplinger Readers' Choice Awards 2023²



**One of the Most Trustworthy
Companies in America 2023**
by Newsweek³



Earned a 2023 Hearts & Wallets
Top Performer™ recognition
in "*Understands me and shares
my values*"
the fifth time earning this recognition⁴

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



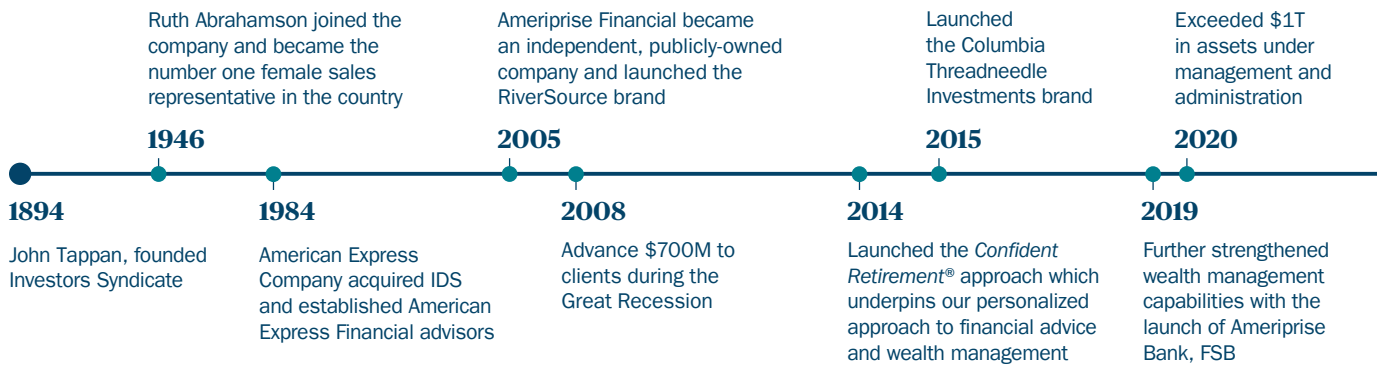
Anytime access
to your investments and digital tools
to help you stay on track

Experience you can count on

- Serving more than **2 million individual**, business and institutional clients⁵
- Working with more than **10,000 financial advisors** serving clients in the U.S.⁶
- Managing more than **1 trillion** in assets under management and administration⁷
- Ranking as the **#30 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.



Footnotes and Disclosures:

1. Ameriprise created the Client Experience Survey to give clients an opportunity to rate their satisfaction with a financial advisor or practice using a scale of 1 to 5. Each client has an opportunity to access the Ameriprise Secure Client Site and provide a rating. The client satisfaction score is an average of all client responses for that advisor or practice within a rolling 24-month period as of 12/31/2023. There is no minimum number of responses required for an advisor or practice to receive a rating and advisors or practices may have received unfavorable ratings. Client experiences may vary, and working with any Ameriprise financial advisor or practice 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 a financial advisor's or practice's qualifications.
2. Kiplinger readers were invited to take the 2023 Readers' Choice Awards survey on Kiplinger.com from Feb. 28-March 31, 2023. Kiplinger received more than 2,600 total completed surveys —725 of which answered the questions pertaining to the Wealth Management category. Respondents selected the wealth management company they used most frequently, and then rated that provider on a ten-point scale in four criteria: likelihood to recommend to others, overall satisfaction, trustworthiness of the firm's advisors and quality of financial advice. Kiplinger determined the overall winner in each category by identifying the provider with the highest total score of all criteria. For more information, visit <https://www.kiplinger.com/personal-finance/kiplinger-readers-choice-awards>. Ameriprise did not pay a fee to be evaluated for this list but did pay a fee to cite the results. Award is not indicative of future performance or representative of any one client's experience. **From Kiplinger's Personal Finance. ©2023 The Kiplinger Washington Editors. All rights reserved. Used under license.**
3. Newsweek and Statista recognized the Most Trustworthy Companies in America across 23 industries. Approximately 25,000 U.S. residents were surveyed from July to November 2022 about U.S.-based companies with revenues over \$500 million, rating those with which they were familiar in three areas of trust: customer, investor, and employee. Social listening assessments were conducted for the top 1,000 companies with sufficient survey responses. A total of 272,000 mentions were collected live (January to February 2023) and from historical data (October 2022 to January 2023). The final 700 companies were ranked based on an aggregate score of survey and social listening results. Ameriprise did not pay a fee to be evaluated for this list but did pay a fee to Statista to cite the results. For more information, visit <https://www.newsweek.com/rankings/most-trustworthy-companies-america-2023>.
4. This recognition is from the 2023 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 annual 2022 Investor Quantitative™ Database was fielded August 15 -September 15, 2022, to 5,993 respondents in 36 quota cells (age, asset groups and gender) and weighted to national based on age and assets using 144 cells drawn from the most recent Federal Reserve Survey of Consumer Finances and Hearts & Wallets analysis. 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 higher than other providers at a statistically significant level. 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 fifth time Ameriprise has earned a Top Performer recognition in "Understands me and shares my values" based on data from 2016, 2017, 2018, 2019 and 2022. 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 Q3 2023 Earnings Release.
7. Company data, as of Q3 2023.
8. Pensions & Investments/Thinking Ahead Institute World 500: World's largest money managers – June 12, 2023 issue. Data as of Dec. 31, 2022.

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.

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