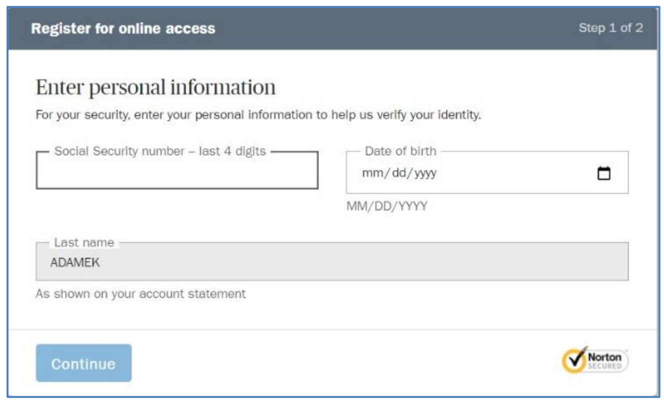
Secure Site Tutorial

Working together with your advisor, digitally, through the secure site, will allow you to have full transparency into your accounts from any device you choose at any time. The secure site enables you to work securely with your advisor, share documents, and see progress towards your financial goals.

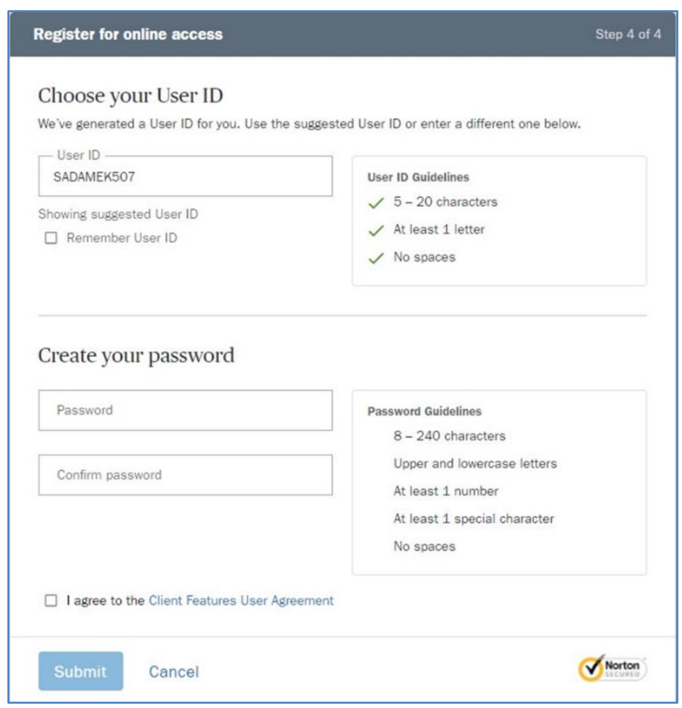
This document contains information about:

- Setting up your account
- Secure Site overview
- Secure Site benefits

Setting up your account: If you've received an invitation link to register for the secure site via email or text

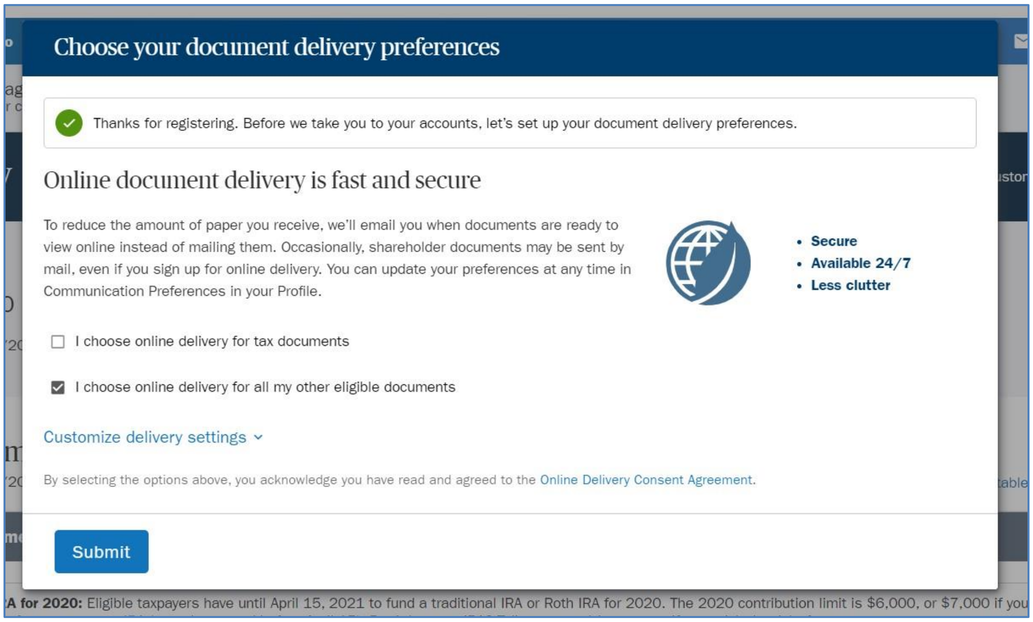


1. On **Register for online access step 1 of 2** page:
    - Type last 4 digits of social security number
    - Type date of birth (MM/DD/YYYY)
    - Click **Continue**

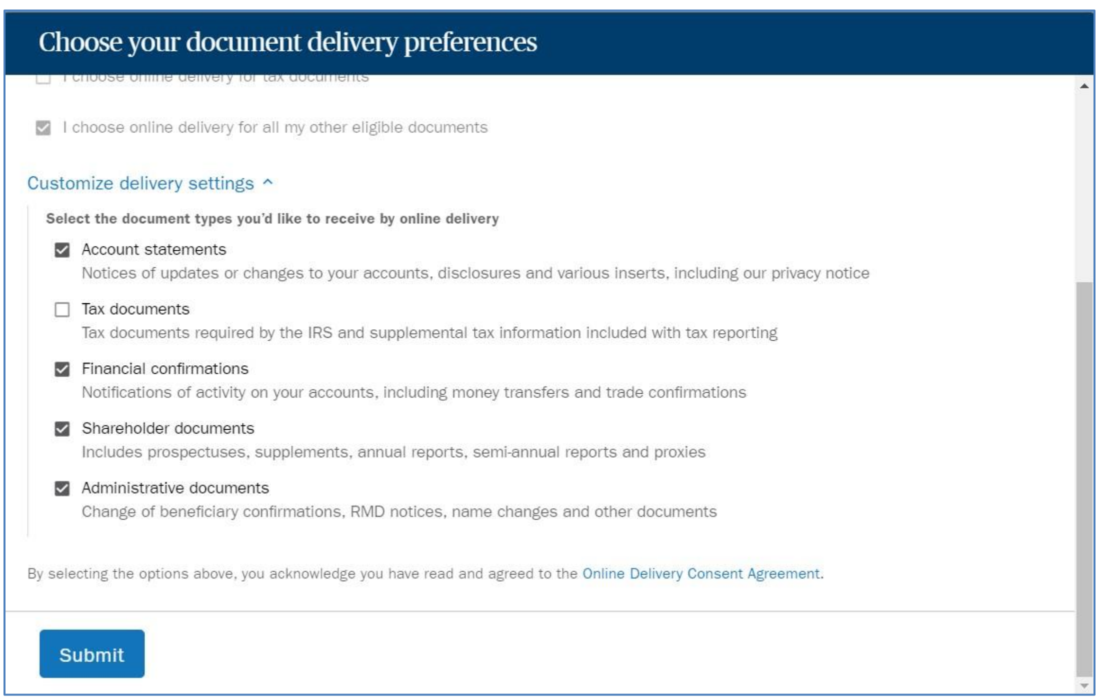


2. On **Register for online access step 2 of 2** page:
    - Type a User ID (requirements on right side)
    - Clients can use the suggested User ID if desired
    - Type a password twice (requirements on right side)
    - Click the 'I agree to the **Client Features User Agreement**' checkbox
    - Click **Submit**

3. On **Choose your document delivery preferences** page:
    - Click **Customize deliver settings** to expand and see options for each document type
    - Click the checkbox for each document type you wish to have Online delivery
    - Click **Submit**

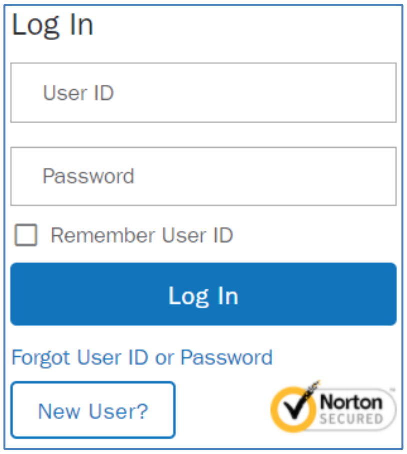


The expanded **Choose your document delivery preferences** page will look like this:

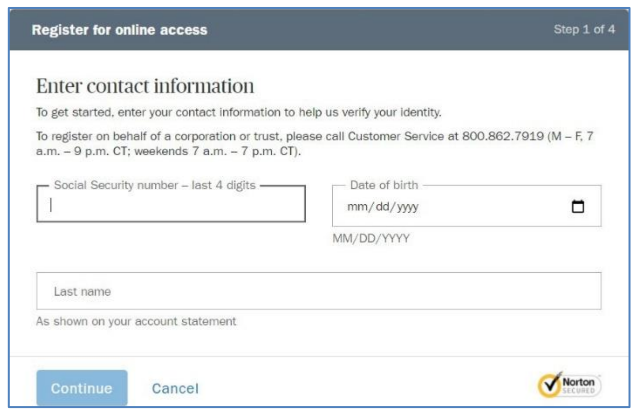


Setting up your account:
If you're registering for the secure site directly through Ameriprise.com

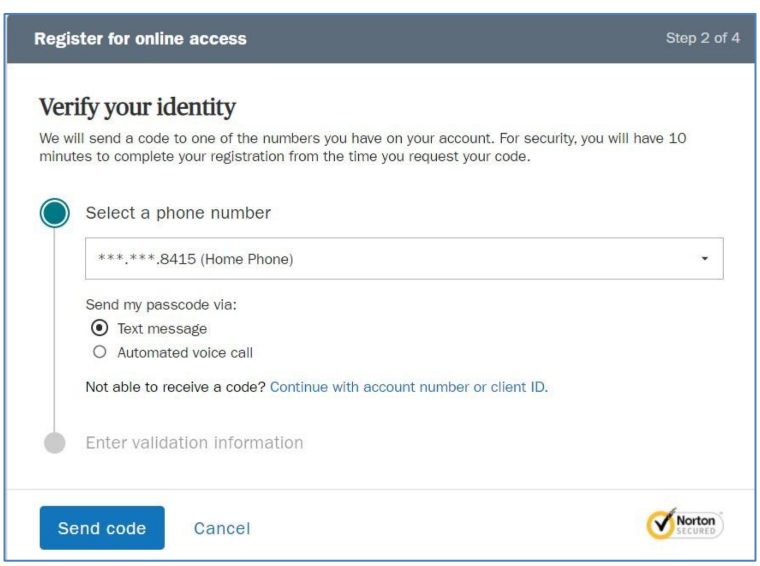
1. Click New User in Ameriprise.com log in widget:



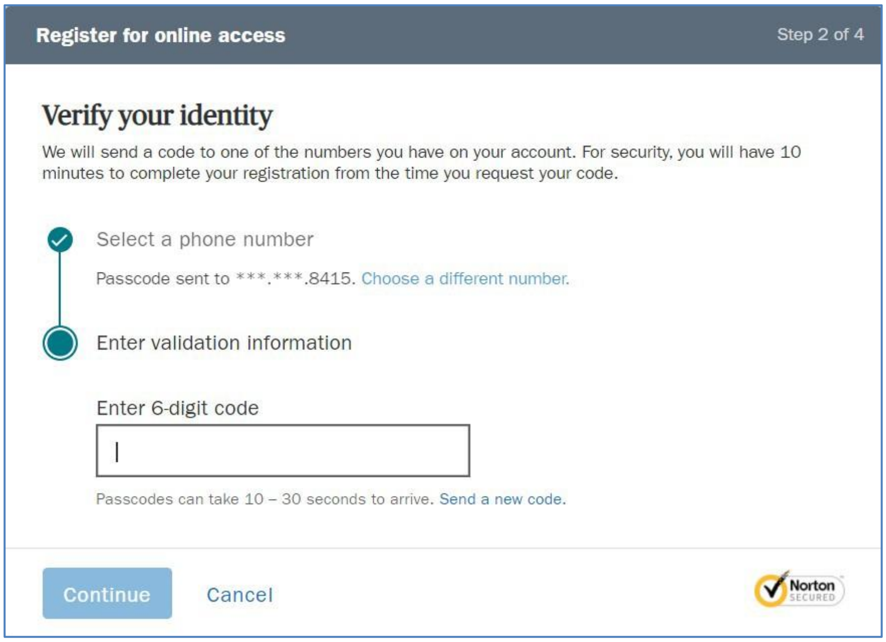
2. On **Register for online access step 1 of 4** page:
   - Type last 4 digits of social security number
   - Type date of birth (MM/DD/YYYY)
   - Type last name
   - Click **Continue**



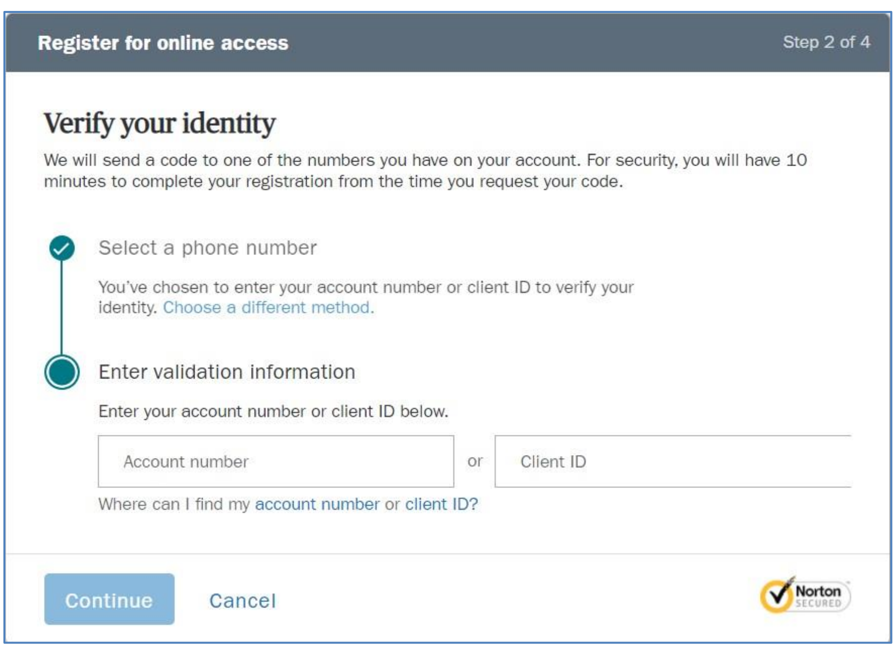
3. On **Register for online access step 2 of 4** page:
   - Select a phone number from the phone number dropdown
   - Select **Text message** or **Automated voice call** radio button
   - click **Send code**
   - If you click the **Continue with account number or client ID** link, go to step 5 below



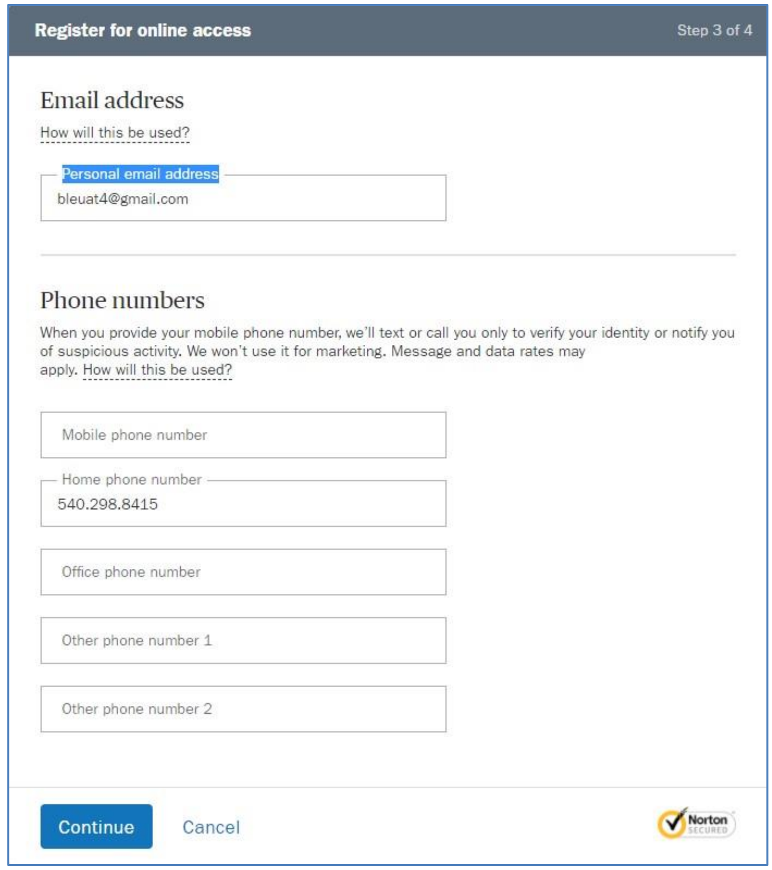
4. On **Register for online access step 2 of 4** page:
   - Enter the OTP code received via text message or voice call
   - Click **Continue**
   - Proceed to Step 6



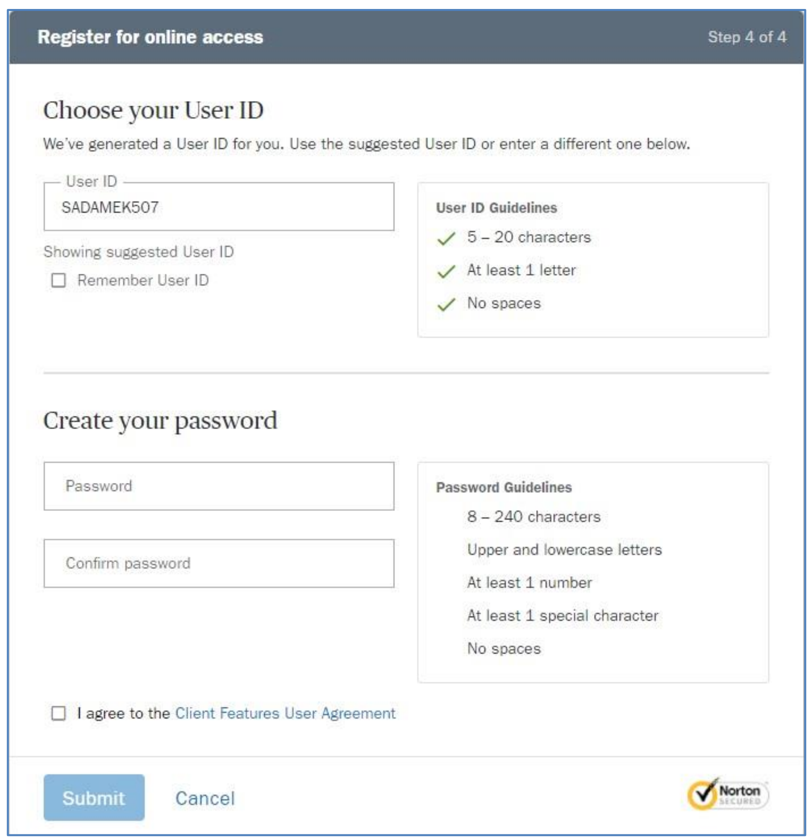
5. (If you click the Continue with account number or client ID) On **Register for online access step 2 of 4** page:
   - Enter one of your account numbers or your client ID
   - Click **Continue**
   - Proceed to Step 6



6. On **Register for online access step 3 of 4** page:
   - Validate your email address and telephone numbers (change if incorrect)
   - Click **Continue**



7. On **Register for online access step 4 of 4** page:
   - Type a User ID (requirements on right side)
   - Clients can use the suggested User ID if desired
   - Type a password twice (requirements on right side)
   - Click the 'I agree to the **Client Features User Agreement**' checkbox
   - Click **Submit**



8. On **Choose your document delivery preferences page:**
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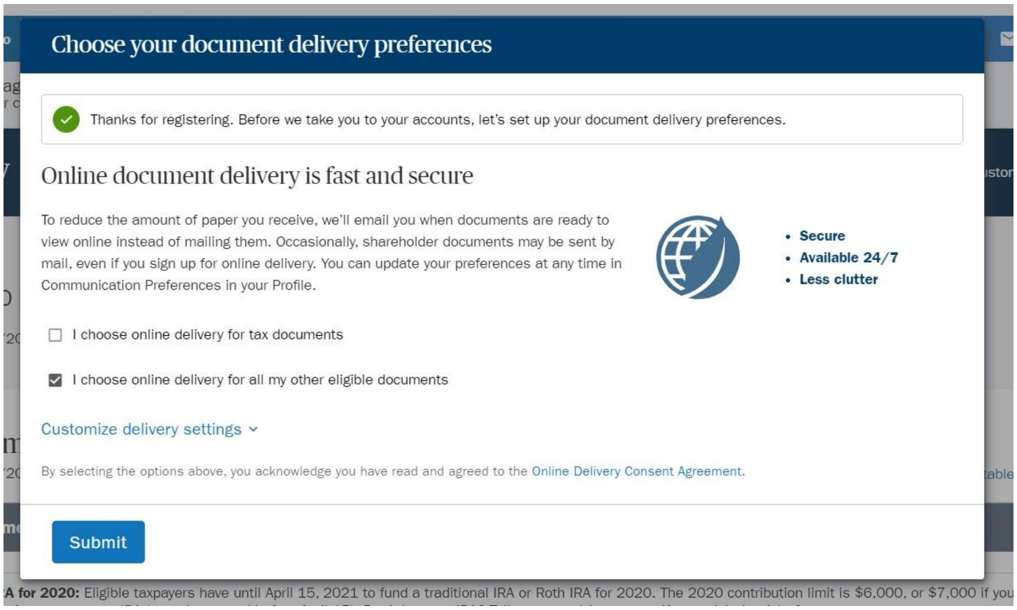
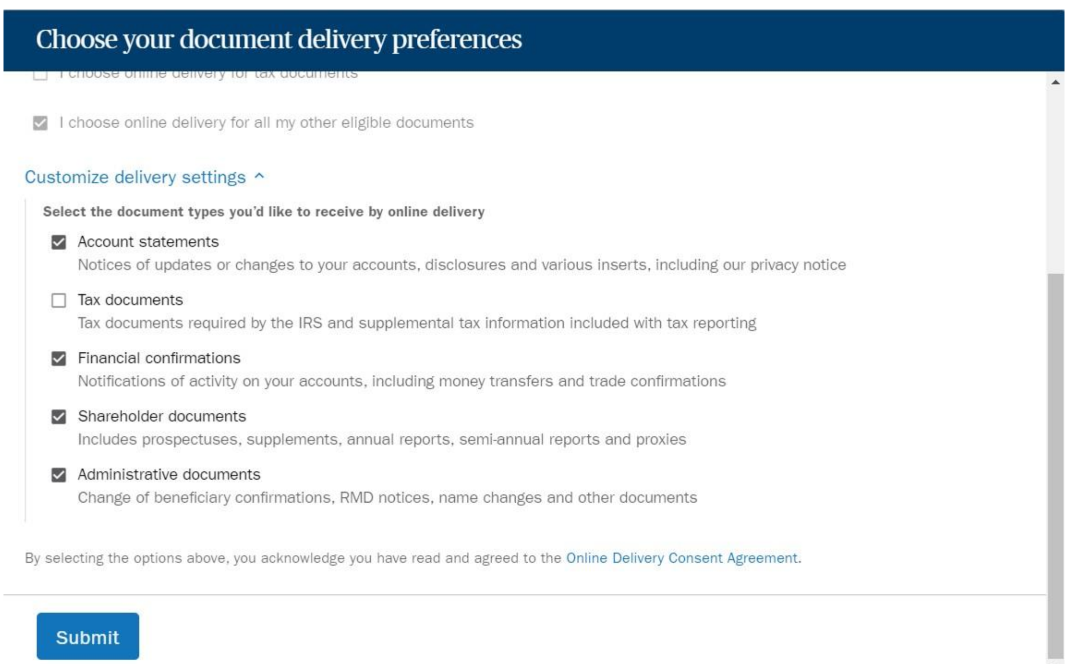


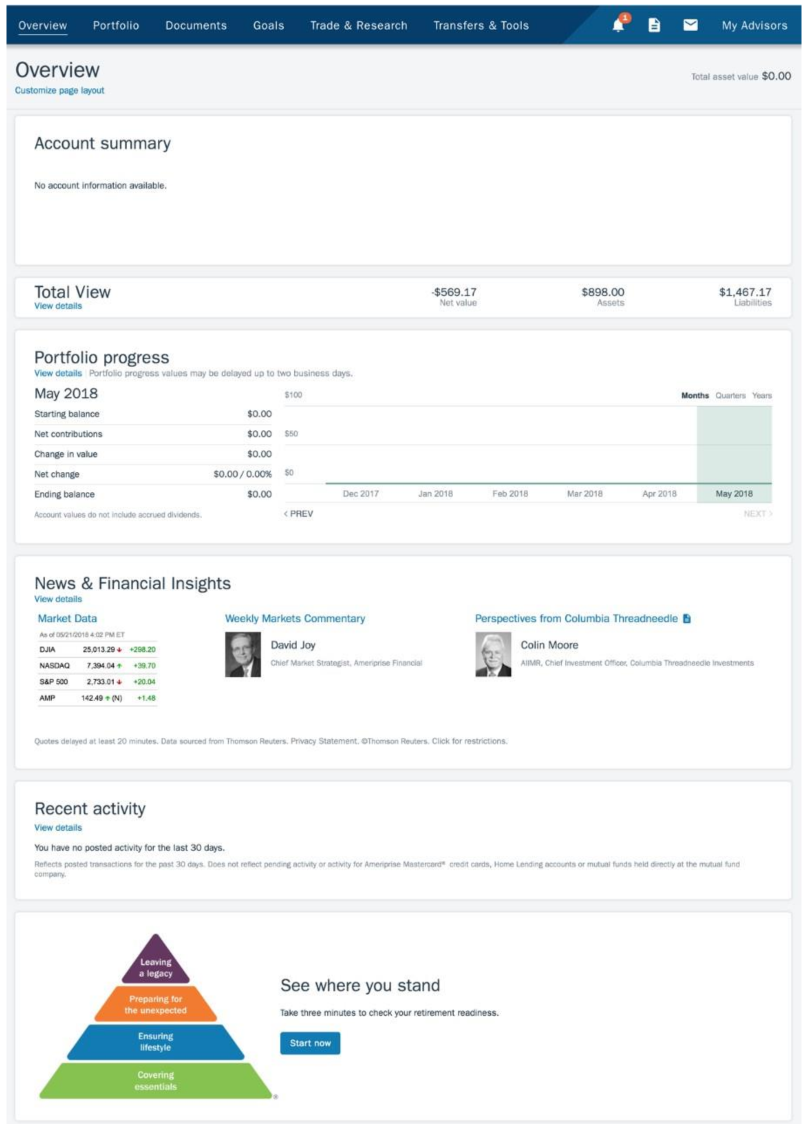
The expanded Choose **your document delivery preferences** page will look like this**:**



Secure Site Overview

The information below reflects using the secure site on ameriprise.com on a computer-based browser. Smaller screens like tablets and phone web-based navigation is similar, but the information and menus automatically contract and format to fit the window size.

The first time you log into the secure site, a pop up tutorial on the *Overview* page will guide you through the site. You must click through the tutorial before using the secure site on ameriprise.com.



Below *Overview* is a *Customize page layout* link that displays a pop-up window where you can rearrange the order of information displayed on your *Overview* page or have certain sections hidden. Sections that can be moved or hidden include:

- Total View
- Account summary (can only be moved, not hidden)
- Portfolio progress
- Recent activity
- News & Financial Insights
- Advisor information (can be locked to the bottom of page instead of floating, not hidden)

Total asset value

- Combines the values of accounts held at Ameriprise
- Change in value of all your Ameriprise Brokerage Platform account
- Values in both dollars and percent with an up (green) or down (red) indicator
- Provides timestamp for when the data was updated

Total View

Total View is an account aggregation tool that allows you to have a more complete view of your financial picture. Total View enrollment also allows your progress towards your goals to update in real time. We encourage all clients to sign up for, and add accounts into Total View. Please speak to your advisor if you have questions about Total View and its benefits.

If you enroll in Total View:

- The Total View bar displays below the Total Asset Value bar
- The Net Value, Assets and Liabilities generate values from accounts you add
- The *View details* link will take you to the full *Total View* page If you do not enroll in Total View
- The Total View bar displays below the Recent activity section
- An *Enroll now* link replaces the *View details* link

Account Summary

The account summary holds the account information and group selector (if multiple groups). The top displays a timestamp showing the last retrieved date and time for the financial data.

This section contains a quick view of the Portfolio Progress of your combined accounts. The graph defaults to a *Months* view, but can be changed to a *Quarters* or *Years* view.

View details can be clicked to show additional information and will take you to the *Portfolio Progress* page under the *Portfolio* menu.

Portfolio Progress

The Portfolio sub-pages list your combined accounts in the currently selected group. The sub-pages do not include pension groups.

Recent Activity

The Recent Activity section displays recent transactions within your accounts.

News & Financial Insights

Links to featured market perspective articles from Ameriprise and a snapshot of current market values.

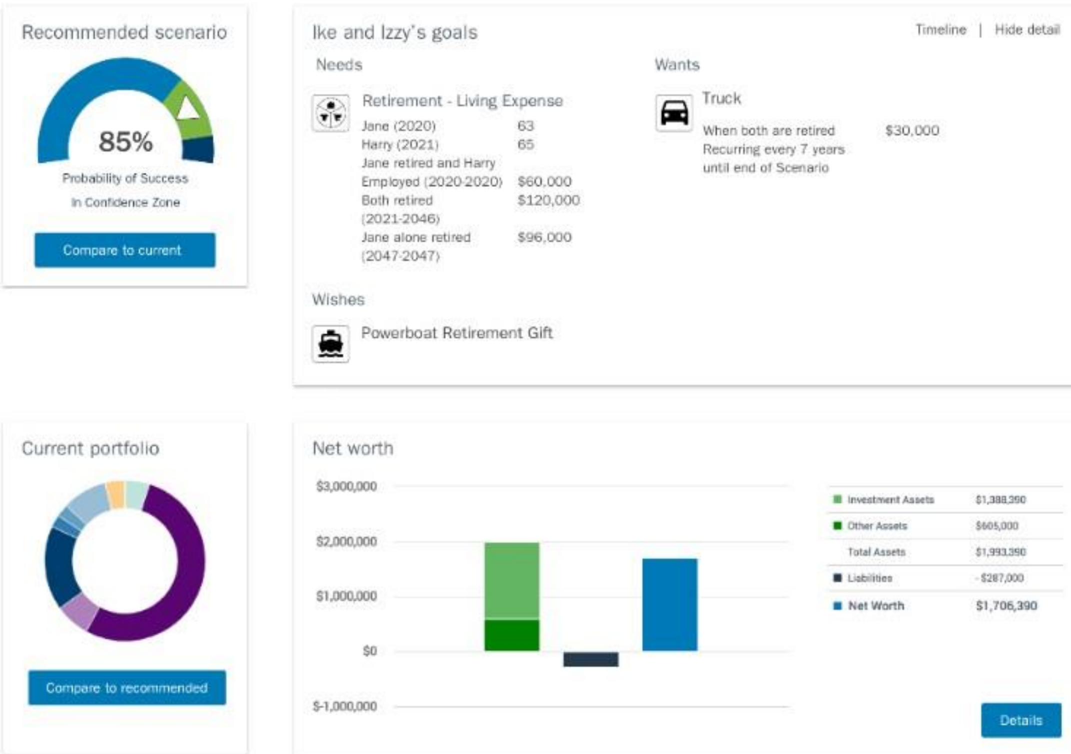
Goals

This section contains our proprietary *3-Minute Confident Retirement®* check. This is a simple questionnaire that will give you an idea of how prepared you are for retirement. You can share your results with your advisor, get a list of recommended questions to ask and see how your confidence level compares to the U.S. average and other Ameriprise clients.

The information displays differently here based on if you have navigated through the retirement check or not.

- If you have not taken the check, click *Start now* to navigate through the check
- If you have taken the retirement check, a snapshot of the results displays and you can click *Review your results* to view the result details

The results of the check verify what you selected and provides additional information for each category.



Secure Site Benefits

To get the most out of your digital secure site experience, make sure you understand and use each of the following features:

E-delivery

You can receive important financial documents online rather than in the mail to ensure flexibility, convenience and security.

- Reduce the amount of paper received by choosing which Ameriprise Financial documents you want to receive electronically
- Easily access account documents at your convenience on the secure site in Statements & Documents
- Reduce the risk of stolen mail and loss of paper documents from natural disaster with state-of-the-art security and privacy technology

Alerts

Alerts, both email and text, keep you informed of account changes and activity. They are a great way to help you feel more confident and gain more control over how you safeguard your information.

- Profile and security alerts: When your address, phone, email address or password are changed; or when your account has been locked or accessed from a new device or browser
- Account alerts: When external bank accounts are added for money transfers, or money transfers are requested or updated
- Advisor alerts: When new documents, secure messages or meetings are shared with you

eSignature

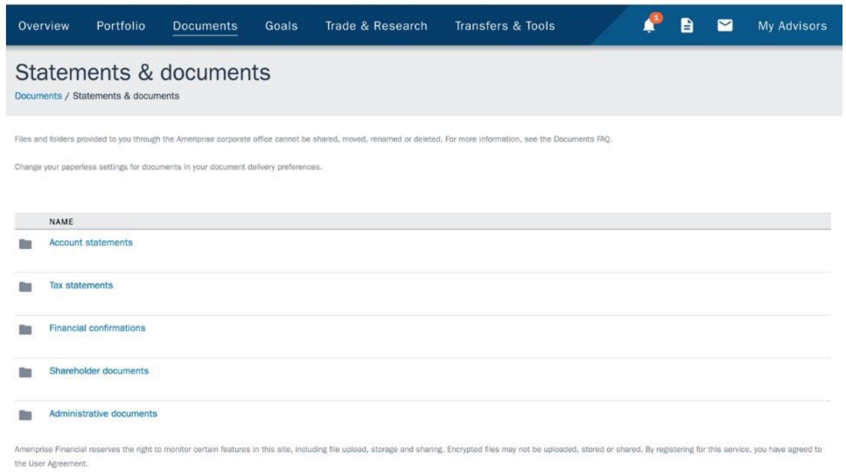
eSignature allows you to sign documents electronically.

- Saves time and reduces the amount of paper received
- Shortens the processing time of documents
- Easily and securely access and e-sign documents on the secure site

Statements & Documents

Upload, share and store documents safely and securely. Your advisor can also upload documents for you to view and collaborate on.

- You can securely and easily share documents with significant others in your household if you are both registered for the site
- Provides you a secure location with unlimited free storage to upload and store important documents — wills, passport copies, birth certificates — for your own use



Meetings and Notes

You can view future and past meetings and meeting details when those meetings have been shared by your advisor.

- You can view meetings on the secure site including detailed meeting information and connection details for virtual meetings
- You can add meetings to your personal calendar
- Receive new meeting and reminder emails and alerts

Bill Pay and Money Movement

Make one-time or recurring transfers to and from external accounts, as well as conduct transfers between Ameriprise accounts. Conduct trades and review balances. And gives you an online solution for paying bills.

- Automatically add money to your accounts
- Online bill pay is an online solution you can use to pay bills out of your *Ameriprise ONE*® Financial Account or *Ameriprise*® SPS *Advantage* account

Message Center

Communicate with your advisor securely through the message center inside the secure site. Set up your notifications to receive an email or text message each time you receive a message inside of the message center.

- Functions like an email inbox allowing you to set up folders and organize your messages.
- Add contacts and attachments to securely share documents.

Take advantage of most of these features and more with the Ameriprise Financial App.

Disclosures:
The secure site is intended for informational purposes only and is not an official report of any of your accounts. Accuracy, completeness and timeliness cannot be guaranteed.

The displayed value of your accounts on the secure site and current market value of your securities may be updated using at least 15-minute delayed quotes for exchange-traded securities during market hours. Market data should be used for informational purposes only and is subject to change.

Account data on screenshots in this document is for illustrative purposes only, does not reflect actual account data and is not a recommendation.

The third party account information shared with your financial advisor through Total View is for informational purposes only. Review or analysis of this information does not constitute an endorsement or recommendation by your financial advisor or Ameriprise of the investments, products or services held or utilized by you and referenced by such third-party account information and does not create a duty to advise you with respect to such third-party assets and services.

Investment products are not federally or FDIC insured, are not guaranteed by any financial institutions, and involve investment risks including possible loss of principal and fluctuation in value.

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