

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



Included on
**The Wall Street Journal
Management Top 250 list**
for 2023³



Ranked the
**#3 brand among investment
firms for Customer Trust**
according to Forrester's 2023
U.S. Customer Trust Index⁴

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



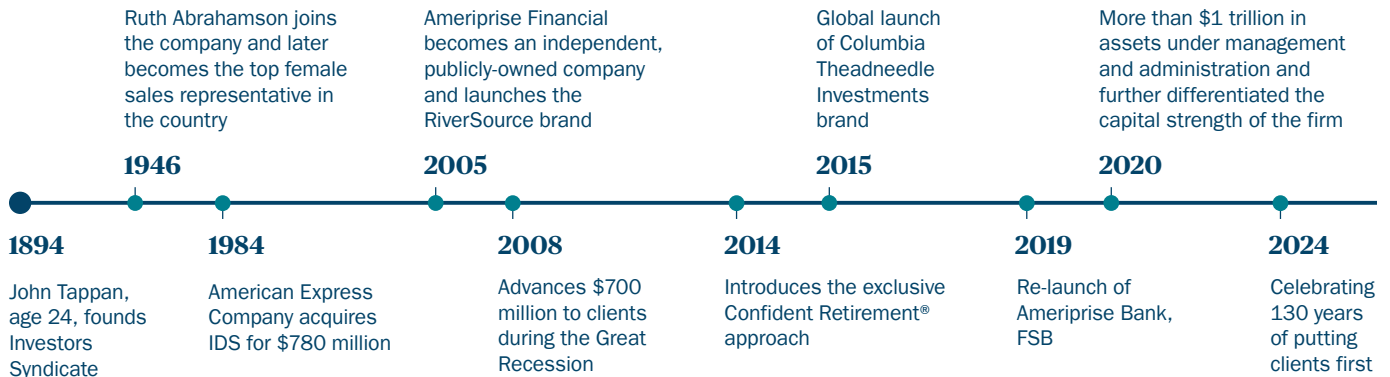
Anytime access
to your investments and digital tools
to help you stay on track

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 **#26 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. The Wall Street Journal Management Top 250 ranking for 2023 is based on a holistic measure of corporate effectiveness developed by the Drucker Institute. More than 700 U.S. companies were evaluated on 34 indicators across five dimensions of corporate performance: Customer Satisfaction, Employee Engagement and Development, Innovation, Social Responsibility and Financial Strength. All data collected was the most current available as of June 30, 2023. Ameriprise did not pay a fee to be evaluated for this rating. Ameriprise did pay a licensing fee to use the Management Top 250 logo. See <https://www.drucker.institute/company-rankings/the-wall-street-journal-management-top-250/>.
4. Ameriprise Financial received the third highest Customer Trust Index scores among Financial Services in Forrester's proprietary 2023 U.S. Customer Trust Index rankings. The ranking was based on Forrester's Customer Trust Index Scores, derived from Forrester's Customer survey of 10,678 U.S. online consumers measuring 11 Investment Firms from April to June 2023. Customer Trust Index scores for individual financial services brands reflect the average level of trust customers have in a brand. Forrester Research does not endorse any company included in any Customer Trust Index report and does not advise any person to select the products or services of any particular company based on the ratings included in such reports. Ameriprise did not pay a fee to be evaluated for this rating. Ameriprise did pay a licensing fee to publicly cite the results of the survey.
5. Company reports.
6. Ameriprise Financial Q4 2023 Earnings Release.
7. Company data, as of Q4 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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