

## Applicable advisory account programs

### Advisory accounts relying on PPA advice exemption

#### Applicable Advisory Account Programs

*Ameriprise® Strategic Portfolio Service Advantage*  
*Ameriprise® Active Portfolios® investments*  
*Ameriprise® Select Separate Account*  
*Ameriprise® Vista Separate Account*  
*Ameriprise® Investor Unified Account*  
*Ameriprise® Access Account*



#### Eligible Account Ownership Types

- All IRAs
  - Traditional IRA
  - ROTH IRA
  - Inherited IRA
  - Inherited ROTH IRA
  - Rollover IRA
  - Simple IRA
  - SEP IRA
- 403(b) accounts – only 501(c)(3) organizations subject to ERISA
- Custodial 401(a) Plans
- Investment Only Plans – participant directed only

Please review the Ameriprise® Managed Accounts Client Disclosure Brochure or if you have elected to pay a consolidated advisory fee, the Ameriprise® Managed Accounts and Financial Planning Service Disclosure Brochure, for a full description of services offered, including fees and expenses as well as any applicable updates.

**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.**

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