

BY THE NUMBERS

THE ULTIMATE ADVISOR PARTNERSHIP®

Today, Ameriprise Financial stands tall as the Ultimate Advisor Partnership – a premier financial services firm – a FORTUNE 500® company¹ with more than a decade of independence and a nearly 130-year legacy of strength, stability and putting clients first.



#1 Among Wealth Managers
Ameriprise Financial²

9
out of
10

SUPERIOR SUPPORT DRIVES HIGHER SATISFACTION

Ameriprise advisors say they have better technology, financial planning capabilities and ability to acquire clients than they did at their prior firms⁵

CLIENT SATISFACTION

4.9/5

Clients rate Ameriprise
in overall satisfaction⁸

AUM/A
over **\$1T**

Assets under management
and administration³



Ameriprise has been recognized
by J.D. Power for providing
“an outstanding customer
service experience”

for phone support for advisors
for four consecutive years.⁶

ADVISOR RETENTION RATE

95%

For advisors with us more
than 10 years⁹

TECHNOLOGY INVESTMENT⁴

\$900M⁺

AMERIPRISE ADVISORS ACHIEVE

on average **9%**
annual growth⁷



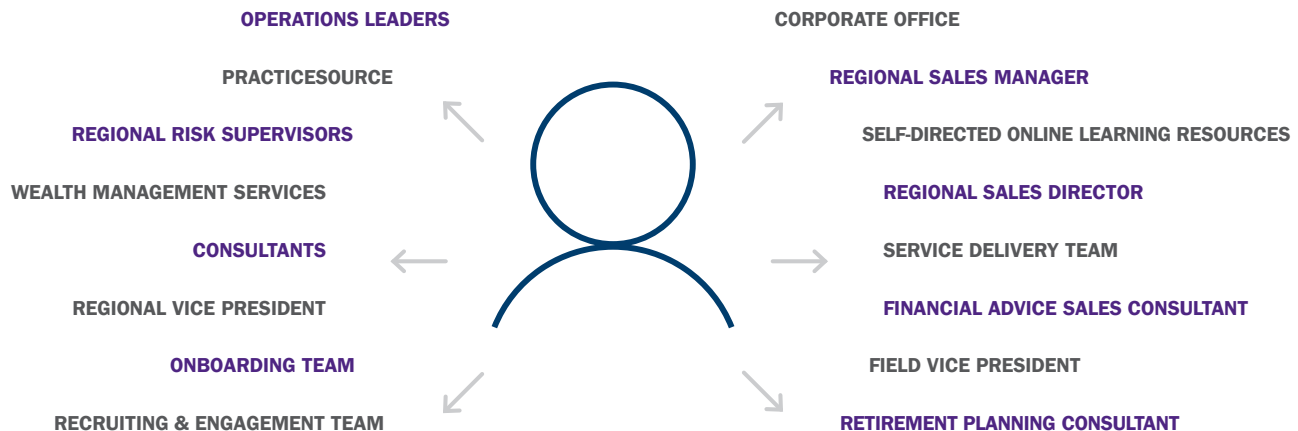
Recognized by Newsweek as
one of America's Most Trusted
Companies 2023¹⁰

“I joined Ameriprise because they understand where the puck is going with advice. Our breadth and depth of offerings, combined with the rich culture and heritage engrained in the people here, makes me excited about the opportunity for advisors at Ameriprise.”

Glenn Flego, Ameriprise Field Vice President

Supporting you as you serve *your clients*

Personalized support — resources to help enable success **16:1**



In the last 5 years, approximately 1,800 advisors have joined Ameriprise.¹¹

If you're looking for a firm that puts clients first, helps advisors grow — and fosters a strong culture — find out more about Ameriprise. You'll be glad you did.

Where could your business be with the right support? *Let us know if we can help.*

¹ Fortune 500 ranking published June 2023 is based on 2022 total revenue.

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 Company data, as of Q2 2023.

⁴ Ameriprise Financial spent over \$900 million in technology over the last five years. Company data, 2023.

⁵ The Ultimate Advisor Partnership Survey, Ameriprise Financial, November 2021. Survey data covered 294 experienced advisors that moved their book of business to Ameriprise within the last one-to-five years, and asked those surveyed to compare Ameriprise's capabilities to the capabilities at their prior firm. Not all experienced advisors who transitioned to Ameriprise were surveyed.

⁶ J.D. Power 2022 Certified Customer Service ProgramSM recognition is based on successful completion of an evaluation and exceeding a customer satisfaction benchmark through a survey of recent servicing interactions. Ameriprise advisors evaluated the firm's performance in these factors: satisfaction with the IVR routing process, and the customer service representative which includes knowledge, courtesy, concern, call duration/transfers/hold time, and timeliness of resolution in addition to overall satisfaction. Ameriprise paid a fee to J.D. Power to be independently evaluated through this program and cite the results. Ameriprise's use of results of the evaluation is subject to a license fee. For more information, visit www.jdpower.com/cc.

⁷ Company data, Net Revenue per Advisor 2016 to 2021 CAGR.

⁸ Clients can respond to an internal Ameriprise survey and rate an advisor or practice based on their satisfaction with the team or practice, on a scale of 1 to 5 (1 = extremely dissatisfied to 5 = extremely satisfied). Client experiences may vary and working with any Ameriprise Financial practice is not a guarantee of future financial results. Investors should not consider this rating a substitute for their own research and evaluation of a financial practice's qualifications. Only clients with access to the Ameriprise Secure Client Site may submit a rating. Ratings reflect an average of all client responses received over a rolling two-year period as of 12/31/2022.

⁹ Ameriprise Financial 2022 Annual Report and 10K.

¹⁰ 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>.

¹¹ Company data 2018 – 2023.

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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