

# 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® company with more than a decade of independence and a 130-year legacy of strength, stability and putting clients first.



#1 Among Wealth Managers  
Ameriprise Financial<sup>1</sup>

### AUM/A

more than **\$1T**

in assets under management  
and administration<sup>2</sup>

### TECHNOLOGY INVESTMENT<sup>3</sup>

**\$900M<sup>+</sup>**

**9**  
out of  
**10**

### SUPERIOR SUPPORT DRIVES HIGHER SATISFACTION

Ameriprise advisors say they have better financial planning capabilities, have support for deeper client relationships through financial planning and advice and are enabled to run their practices in a way that aligns with their values than they did at their prior firms.<sup>4</sup>



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

for phone support for advisors  
for five consecutive years.<sup>5</sup>

### CLIENT SATISFACTION

**4.9/5**

Clients rate Ameriprise  
in overall satisfaction<sup>7</sup>

### ADVISOR RETENTION RATE

**94%**

For advisors with us more  
than 10 years<sup>8</sup>

### AMERIPRISE ADVISORS ACHIEVE

on average **9%** annual growth<sup>6</sup>



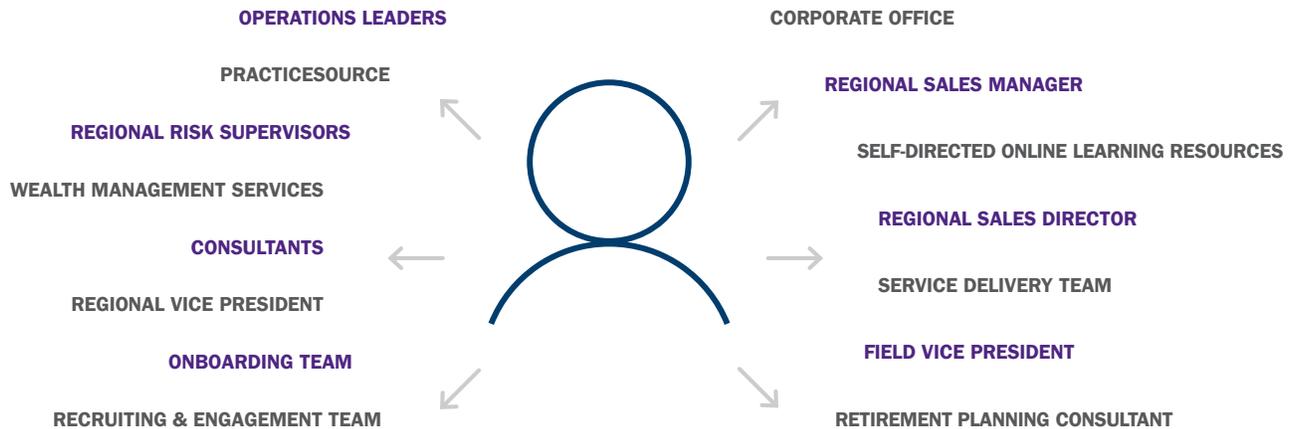
Recognized by Newsweek as  
one of America's Most Trusted  
Companies 2023<sup>9</sup>

*“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**



**We are attracting experienced, productive advisors, with more than 400 advisors moving their practices to Ameriprise in 2023 and more than 1,700 in the last 5 years.<sup>8</sup>**

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.*

<sup>1</sup> 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.**

<sup>2</sup> Company data, as of Q4 2023.

<sup>3</sup> Ameriprise Financial spent over \$900 million in technology over the last five years. Company data, 2023.

<sup>4</sup> Ameriprise asked experienced advisors who moved their book of business to the firm in the last one-to-five years to compare its support, resources, and capabilities to their previous firm and state their satisfaction with their experience. The survey results identified the top ways Ameriprise stands out compared to competitors. 284 advisors responded to the "Ultimate Advisor Partnership" survey, which was conducted by the Ameriprise Strategic Insights team from October- November 2023.

<sup>5</sup> J.D. Power 2023 Certified Customer Service Program<sup>SM</sup> recognition is based on successful completion of an operational evaluation and exceeding a customer satisfaction benchmark through a survey of recent servicing interactions. J.D. Power certified Ameriprise customer satisfaction performance for advisors in these factors: satisfaction with the IVR routing process, and the customer service representative which includes knowledge, courtesy, concern, promptness in getting to a representative, and timeliness of resolution in addition to overall satisfaction. Ameriprise paid a fee to J.D. Power to have their advisor support experience independently certified through this program and cite the results. Ameriprise's public use of the certification is subject to a license fee. For more information, visit [www.jdpower.com/awards](http://www.jdpower.com/awards).

<sup>6</sup> Company data, Net Revenue per Advisor 2017 to 2022 CAGR.

<sup>7</sup> 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.

<sup>8</sup> Ameriprise Financial 2023 10-K.

<sup>9</sup> 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>.

**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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