

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®¹ company with more than a decade of independence and a 130-year legacy of strength, stability and putting clients first.



Named one of America's Best Companies 2025 by *Forbes*²

AUM/A
Ameriprise has
\$1.5T

in assets under management, administration and advisement as of Dec. 24, 2024³

Since becoming an independent public company in 2005, Ameriprise Financial has **invested more than \$6 billion in the firm**, including new products, tools and capabilities and acquisitions⁴

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 firms⁵



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

for phone support for advisors for six consecutive years⁶

AMERIPRISE FRANCHISE AND EMPLOYEE ADVISORS HAVE ACHIEVED

on average **11%**

annual growth the past five years⁷

CLIENT
SATISFACTION
4.9/5

Clients rate Ameriprise in overall satisfaction⁸

ADVISOR
RETENTION RATE
94%

For advisors with us more than 10 years⁹



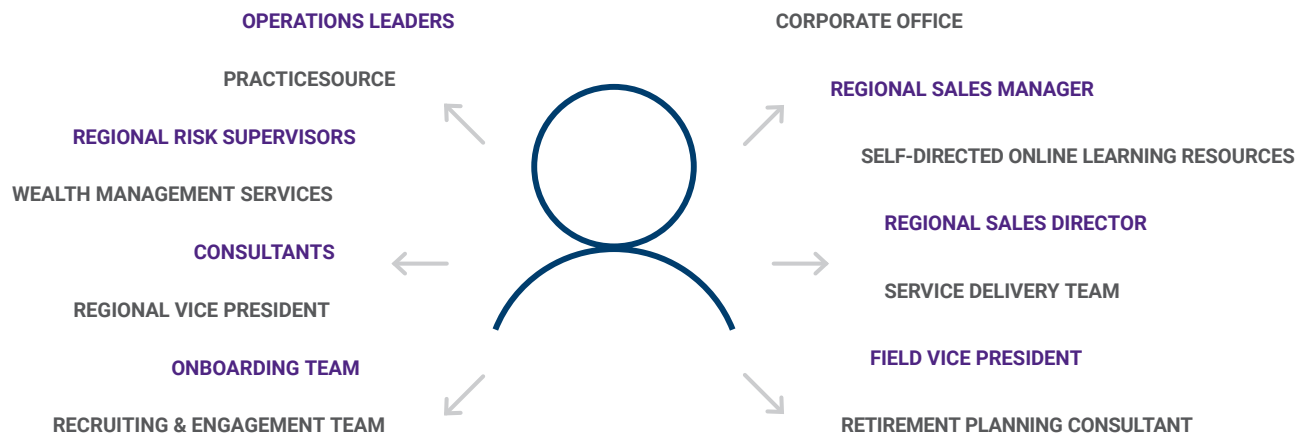
Recognized by Newsweek as one of America's Most Responsible Companies 2025¹⁰

"I believe what we do at Ameriprise is truly different. We partner with our advisors and offer a supported independence model that empowers advisors to bring their vision for their practice to life – the way they want."

Athena McGuire, MBA, CRPC®, AAMS®, Franchise Field Vice President

Supporting you as you serve *your clients*

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



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 The Fortune 500 ranking published June 2024 and is based on revenue as of Dec. 31, 2023. Ameriprise did not pay a fee to be included on this list but did pay a fee to Fortune to cite the results. From Fortune ©2024 Fortune Media IP Limited. All rights reserved. Used under license. Fortune and Fortune 500 are registered trademarks of Fortune Media IP Limited and are used under license. Fortune and Fortune Media IP Limited are not affiliated with, and do not endorse the products or services of, Ameriprise Financial, Inc.
- ² Forbes recognized America's Best Companies 2025 based on an evaluation of more than 2,000 U.S. headquartered public companies across 11 categories: employee and customer sentiment, financial strength, DEI, cybersecurity, media sentiment, public trust, sustainability, remote work policies, workforce stability, and accessibility policies/performance. The top 300 companies were included in the final list. Ameriprise did not pay a fee to be evaluated for this ranking. Ameriprise did pay a licensing fee to promote their appearance on the ranking. Find more information at <https://www.forbes.com/sites/alanschwarz/2024/10/17/americas-best-companies-2025-methodology/>.
- ³ Ameriprise Financial Q4 2024 Earnings Release.
- ⁴ Company data.
- ⁵ 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.
- ⁶ J.D. Power 2024 Certified Customer Service ProgramSM 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 and clients 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 and client 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.
- ⁷ For the Employee & Independent Advisors group, the average number of advisors in operation for the calendar year ending December 31, 2019 was 6,276, and the average number of advisors in operation for the calendar year ending December 31, 2024 was 5,662. During the 5-Year Period, the CAGR of GDC for the Employee & Independent Advisors group was 11%.
- ⁸ Ameriprise created the Client Experience Survey to give clients an opportunity to rate their satisfaction with their assigned financial advisor or advisor team using a scale of 1 to 5. Each client has an opportunity to access the Ameriprise Secure Client Site and provide a rating. This client satisfaction score is a national average of client responses for all advisors and teams within a rolling 24-month period as of 12/31/2024. Client experiences may vary, and working with any Ameriprise advisor or team 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 an advisor's or team's qualifications.
- ⁹ Ameriprise Financial 2024 10-K.
- ¹⁰ Newsweek partnered with Statista to recognize America's Most Responsible Companies — U.S. companies that show a strong commitment to corporate social responsibility (CSR) in environmental, social and governance (ESG) factors. Statista conducted an analysis of quantitative data from more than 30 KPIs related to ESG, as well as a survey among more than 26,000 U.S. residents from Aug. 31 to Sept. 26, 2024. Survey respondents evaluated CSR performance for companies that were familiar to them. Ameriprise did not pay a fee to be evaluated for this rating. Ameriprise did pay a fee to publicly cite the results of the survey. Find more information at <https://www.newsweek.com/rankings/americas-most-responsible-companies-2025>.

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