

GET THE FACTS

THE ULTIMATE ADVISOR PARTNERSHIP[®]

The support you need, the value you deserve

Ameriprise Financial is built on the strength and depth of our client relationships – and those relationships start with our advisors. That’s why we’re committed to investing in acquisitions, new products, tools and capabilities to help you serve your clients and run a successful, thriving business. We stand tall as one of the strongest, premier financial services firms in the business – a FORTUNE 500[®] 1 company with more than a decade of independence and a 130-year proud legacy.

We give you the freedom, guidance and end-to-end support to run your practice your way – helping you grow, while developing even deeper relationships with clients. When you join Ameriprise, you’ll discover unparalleled **Culture & Strength, Resources & Support, and Opportunity & Value.** That’s the Ultimate Advisor Partnership.

Culture & Strength

To run a successful practice, you need a strong and stable company behind you. Ameriprise has a nationally respected brand, financial strength, integrity and an untarnished reputation for doing what’s right for our advisors and clients.

AMERIPRISE FRANCHISE AND EMPLOYEE ADVISORS HAVE ACHIEVED

on average **11%**

annual growth the past five years²

AUM/A

Ameriprise has **\$1.5T**
in assets under management,
administration and advisement
as of December 24, 2024³

STRENGTH

A strong balance sheet
and credit rankings
**without ever taking
a bailout**

CLIENT SATISFACTION

4.9/5

Clients rate Ameriprise
in overall satisfaction⁴

RECOGNIZED BY NEWSWEEK

as one of
America’s
**Most Responsible
Companies 2025⁵**

“Our strong values, caring, client-centric culture and reputation for doing business the right way define Ameriprise and differentiate our advisors in their communities.”

James M. Cracchiolo, Chairman & CEO

Resources & Support

At Ameriprise Financial, we're committed to helping advisors achieve the vision they have for their practice by providing exceptional, end-to-end support. Our advisor support system enables you to stand out from the competition, grow your practice and deliver an outstanding client experience.



Integrated Technology

Our industry-leading technology enables you to create a secure, compliant and outstanding client experience.



Advice & Solutions

A proven comprehensive financial planning process plus an extensive suite of products and solutions provide you a range of choices to meet clients' needs.



Brand & Marketing

Our award-winning marketing and a nationally recognized brand, combined with your local brand presence, drives results.



Service, Operations & Compliance

The service and protection you need, when you need it most.



Practice Management

Field-proven approach helps you drive efficiencies, increase margins and strengthen the overall value of your practice.



Learning & Development

Accessible leadership, coaches and training resources help you leverage best practices and stay on target to reach your goals.



Transition Support

From the moment you accept the offer, through every phase of your transition, our dedicated support specialist will help make your move seamless.

Opportunity & Value

As a valued member of Ameriprise Financial, you'll have access to best-in-class practice management, leadership, coaching and support to help you bring your practice to the next level. Tap into the expertise of our field leaders to help you take advantage of proven ways to grow your practice and increase revenue. Benefit from our competitive payouts and incentives, as well as exclusive programs for advisors who qualify for our recognition programs. Imagine the possibilities of aligning your practice with a premier firm that offers all this and more.

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 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%.

³ Ameriprise Financial Q4 2024 Earnings Release.

⁴ 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.

⁵ 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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242755-1 AK (04/25)