An integrated experience designed with you and your clients in mind

Robust platform and solutions

Tools and resources to scale your practice

Dedicated support, unbiased research and expertise

Territory Advisor Support Team

Matthew Curtis, CFP®, RICP® – Franchise Field Vice President
As the Franchise Field Vice President (FFVP), Matthew is responsible for providing strategic direction and ensuring advisors have access to the resources they need to be successful. Leads a team to help attract new talent to the firm, develop existing talent and support independent Advisors in growing their business by delivering a premium client experience.
Phone: 615-502-4462   Email: matthew.curtis@ampf.com

Dan Warden – Director, Manager Franchise Recruiting & Engagement
Dan is responsible for Novice and Experienced Advisors Recruiting and Development, staff career path and Experienced Advisor onboarding for the territory. Dan partners with Matthew Curtis, Franchise Field Vice President (FFVP), Franchise Consultants and franchise advisors to drive advisor engagement and practice growth in corporate office and region initiatives. He provides business planning implementation and follow-up support to all levels of field leadership and advisors as needed.
Phone: 615.283.9171 Email: Daniel.Warden@ampf.com

Jessica Marshall – Field Engagement Coordinator
Jessica is the primary point of contact for advisor questions and proactively works with advisors and staff to ensure they receive the support they need. She is a relationship manager for advisors and staff in the territory and partners with Matthew Curtis, Franchise Field Vice President (FFVP) to connect them with corporate resources and programming. Additionally, she provides support and coordination within the territory, including event and conference coordination, developing communications, and other day-to-day support for a variety of initiatives and projects.
Phone: 612.671.3455 Email: Jessica.Marshall@ampf.com

Tim Thrasher – Regional Sales Manager
Tim coaches advisors and their teams on strengthening client acquisition and elevating the Ameriprise Client Experience (ACE). He helps advisors identify and engage the right prospects, implement consistent client experience processes, and leverage digital tools to tell their story, promote their brand, and stay active in today's competitive environment. Tim's goal is to help advisors stay relevant in a rapidly changing marketplace and rise above the competition by building repeatable systems that drive meaningful, sustainable growth.
Phone: 612.671.3817 Email: tim.thrasher@ampf.com

Adam Hirsch, BFA - Senior Regional Sales Director
Adam specializes in helping advisors drive growth through new business opportunities. He is the primary point of contact for increasing assets and revenue through installation of new technology and managed account solutions, as well as book of business reviews. Additionally, he partners with advisors to implement referrable client service and move up market.
Phone: 612.678.3673 Email: adam.1.hirsch@ampf.com

Akansha Singh – FFVP Administrative Assistant for the Territory
Akansha S is the primary point of contact for appointment scheduling for Matthew Curtis, FFVP and works closely with Jessica Marshall, FEC on calendar management. She is also responsible for travel arrangement and additional administrative duties.
Phone: 612.678.3820 Email: akanshashyam.singh@ampf.com

Trish Moll – Franchise Regional Vice President | Mid-America Region
Leads over 1400 financial advisors in the firm's independent channel. She empowers the advisors she supports to think like CEOs and connects them with tools, technology support and marketing resources to help grow their practice at an industry-leading pace. She also recruits and onboards experienced advisors who join Ameriprise.
Phone: 312.706.6843 Email: Trish.Moll@ampf.com

Angela McConnell – Region Coordinator, Asst. to RVP, Trish Moll | Mid-America Region
The primary point of contact and relationship manager for Trish Moll, Regional Vice President office. She ensures leaders, advisors and staff receive the support needed. Additionally, she provides support and coordination within the region, including event and conference coordination and day-to-day support for a variety of initiatives and projects.
Phone: 812.457.2450 Email: Angela.R.McConnell@ampf.com

Mike Schulz – Sr. Director, Franchise Engagement & Implementation | Mid-America Region
Ensures field leaders follow a clear and consistent process for execution, follow-up and accountability of key programs. Manage expenses and recoveries for the region, and responsible for managing daily operations and leadership of staff.
Phone: 612.671.2111 Email: michael.p.schulz@ampf.com

A full suite of products and services with dedicated regional support


Ray Carlson

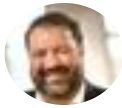

Dan Bennet


Bob Hessler


Josh Kohen


Kurt Kearin


Cameron Younger


Jim Otto

Banking, Cash & Lending

AMP Bank, FSB

***Ameriprise*® Visa Signature® credit cards**

Securities-based Lending
- *Ameriprise*® Preferred Line of Credit, offered through Goldman Sachs Select

***Ameriprise*® Bank Savings Account**

Ameriprise Home Lending Program

Personal trust services

***Ameriprise*® Bank Certificate of Deposit (CD)**

AMP Financial Services, LLC

***Ameriprise* ONE® Financial Account[1]**
Debit card, bill pay, checking

AMP Certificate Co.

***Ameriprise*® Certificates**

Retirement

IRA plans
Traditional, Rollover, Roth, SEP/SIMPLE

Business Retirement Plans
- 401(k), Profit Sharing, Money Purchase Pension, Defined Benefit plans
- Direct-at-fund
- Individual 401(k)
- Investment only

Non-profit/Governmental 403(b) Plans
- Tax-sheltered annuities (TSA)
- Tax-sheltered custodial accounts (TSCA)
- Direct-at-fund
- Group level plans with partner firms

Advisory

***Ameriprise*® Signature Wealth Program**

Active Portfolios® investments

Select ETF Portfolios

Select Separate Account

SPS Advantage
2,100+ mutual funds

SPS Advisor
2,100+ mutual funds

Vista Separate Account
300+ SMA strategies
1000+ mutual funds/ 550+ ETFs

Investor Unified Account
200+ SMA strategies

Select Strategist UMA Portfolios

Access Account
Hold and service

Structured Products & Alternatives Investments

Alternatives
- Hedge funds
- Exchange funds
- Private equity
- Managed futures
- Real estate private placements
- Non-traded REITs
- Non-traded BDCs
- 1031 exchanges
- Non-traded closed-end funds

Employee Stock Options

Exchange Traded Products
- Exchange-traded funds (ETF)
- Exchange-traded notes (ETN)
- Closed-end funds (CEF)

Equities
6000+ companies

Unit investment trusts (UIT)

Master Limited Partnerships (MLP)

Fixed Income
10,000+ CUSIPs daily

Mutual funds
- 137 fund families open for sale (33 full participation)
- 3,700+ funds available for purchase in Brokerage (Class A, C, money markets)
- 2,100+ funds available for purchase in SPS programs

Options

Qualified Opportunity Zones

Structured products
- Principal protected CDs, FDIC insured[2]
- Principal protected notes
- Principal-at-risk
- Yield notes
- Custom offerings

Syndicates
- Closed-end funds
- Preferred offerings

Annuities & Insurance

Annuities
- Variable annuities
- Structured annuities (also known as Registered Index-Linked annuities)
- Fixed index annuities
- Fixed/Multi-year guarantee annuities
- Immediate annuities

Third party insurance
- Long-term care
- Medicare and group
- Life
- Variable Universal Life/ Universal Life/ Whole Life/Term
- Disability

1. The Ameriprise ONE® Financial Account is a brokerage account with cash management features
2. **Certain conditions must be satisfied for pass-through FDIC insurance coverage to apply. Ameriprise Financial Services, LLC is not an FDIC- insured bank; FDIC insurance only covers the insolvency of FDIC-insured banks.**