

# GET THE FACTS

## THE ULTIMATE ADVISOR PARTNERSHIP<sup>SM</sup>

### 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<sup>®</sup> company<sup>1</sup> with more than a decade of independence and a proud 125-year 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, Leadership & 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.

**#1 MOST TRUSTED WEALTH MANAGEMENT COMPANY**  
by Investor’s Business Daily<sup>2</sup>



#### STRENGTH

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

#### AUM/A

over **\$1T**

Assets under management and administration<sup>3</sup>

#### ADVISOR RETENTION RATE

**95%**

Advisor retention rate for advisors with us more than 10 years<sup>4</sup>

#### CLIENT SATISFACTION

**4.9/5**

Clients rate Ameriprise for client satisfaction<sup>5</sup>

*“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

## Leadership & 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.



### PracticeTech® platform

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, we will help make your move seamless.

## Opportunity & Value

As a valued member of the Ameriprise family, 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.*

<sup>1</sup> FORTUNE Magazine, June 2021.

<sup>2</sup> The Most Trusted Financial Companies Survey, is issued by Investor's Business Daily and TechnoMetrica Market Intelligence, ranking financial companies based on consumer trust. The study was conducted in two phases between July 9 and Aug. 11, 2021, with 343 individuals responding to Phase 1 and 6,578 participants in Phase 2. Seventy-four companies met the requirements for inclusion in the rankings, i.e., 100 or 125 respondents, depending on the category. Phase 1 identified attributes of financial institutions that are most important to consumers in terms of "trust". Phase 2 used the attributes defined in Phase 1 and respondents evaluated companies on a five-point scale based on how much they trusted the company regarding that attribute. Scores were computed by taking the difference between the percentage of respondents giving high and low scores. Percentages were weighted and used to produce the Trust Index rating. See <https://www.investors.com/news/most-trusted-financial-companies-survey-methodology/> for the full methodology.

<sup>3</sup> Company data, as of Q4 2020.

<sup>4</sup> Ameriprise Financial 2020 Annual Report and 10-K.

<sup>5</sup> 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 12/31/2020.

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