



NEWS RELEASE

Ameriprise Financial Earns Technology Innovation Award for its Exclusive eMeeting Capability

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The Bank Insurance and Securities Association (BISA) recognized Ameriprise as a leader in technology and innovation at their 2024 annual convention

MINNEAPOLIS--(BUSINESS WIRE)-- Ameriprise Financial (NYSE: AMP) today announced it received the Bank Insurance and Securities Association (BISA) Technology and Innovation Award for its exclusive **eMeeting capability**, which financial advisors use to simplify and enhance their meeting-prep process. With e-Meeting, Ameriprise financial advisors and their staff can create fully-customized and professionally-branded client presentations, freeing them up to spend more time with clients and grow their practices. eMeeting is fully integrated into the firm's Customer Relationship Management (CRM) system and has been used by Ameriprise advisors to create more than 1 million client presentations since being introduced in 2022.

"At Ameriprise, we consistently invest in the firm's technology capabilities to ensure our tools and systems are fully integrated and create an elevated, intuitive experience for our advisors and clients," said **Gerard Smyth, Chief Information Officer at Ameriprise**. "Meeting prep is one of the most time-consuming tasks financial advisors must do. With eMeeting, we've been able to streamline this process, while enhancing the meeting experience for clients. We're constantly hearing from financial advisors and our institutional partners that our capabilities, like eMeeting, are a real differentiator in the marketplace, and we're honored to be recognized as a technology innovator by BISA."

With this award, BISA recognizes firms that are advancing products, services and platforms across the industry through technology innovation. **Click here** for more on the BISA Technology Innovation Award.

To learn more about Ameriprise’s integrated technology capabilities, visit [Ameriprise.com/careers/experienced-financial-advisors](https://ameriprise.com/careers/experienced-financial-advisors).

About Ameriprise Financial

At Ameriprise Financial, we have been helping people feel confident about their financial future for more than 125 years. With extensive investment advice, asset management and insurance capabilities and a nationwide network of approximately 10,000 financial advisors, we have the strength and expertise to serve the full range of individual and institutional investors’ financial needs. For more information, or to find an Ameriprise financial advisor, visit ameriprise.com.

About Ameriprise Financial Institutions Group (AFIG)

With more than 30 years^[1] serving the investment program needs of banks and credit unions, Ameriprise Financial Institutions Group brings a depth of understanding, experience, and knowledge to the financial institutions space – helping deliver value for clients/members while driving revenue for the affiliated institutions. To find out why institutions are partnering with Ameriprise, visit ameriprise.com/afig.

Not FDIC or NCUA Insured		
No Financial Institution Guarantee		May Lose Value

^[1] Investment Professionals, Inc (IPI) was founded in 1992 and specialized in the on-site delivery of investment programs for financial institutions. Ameriprise Financial, Inc. acquired IPI in 2017, bringing together the years of experience of the two organizations.

The Bank Insurance & Securities Association issued the 2024 BISA Technology Innovation Award to recognize the advancement of the financial services industry's products, services and platforms through technology innovation. The BISA Awards Committee, comprised of members of the BISA Board of Directors, evaluated submissions based on the product/service advancement of the financial services industry. The Ameriprise Financial Institutions Group received the 2024 BISA Technology and Innovation Award for eMeeting technology. Ameriprise did not pay a fee to be evaluated nor promote this recognition. For more information, visit <https://www.bisanet.org/page/TechnologyAward>.

Ameriprise Financial and BISA are not affiliated.



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