



NEWS RELEASE

Ameriprise Financial's New Customer Relationship Management System Helps Advisors Deliver Best-in-Class Service

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MINNEAPOLIS--(BUSINESS WIRE)-- Ameriprise Financial, Inc. (NYSE: AMP) today released details on how its new Customer Relationship Management (CRM) system further enables the firm's approximately 10,000 financial advisors to deliver its award-winning customer service to clients¹ and grow their practices. The new system, Ameriprise CRM, built on top of Salesforce Financial Services Cloud, makes it easier for advisors to provide a consistent, referable and advice-based experience to every client.

"Behind every one of our advisors is a compelling suite of technology designed to enhance the client experience," said Kim Hoversten, senior vice president of advisor operations at Ameriprise. "With Ameriprise CRM, we're empowering our advisors to deliver that experience in a seamless and integrated way."

Ameriprise CRM puts more information at advisors' fingertips, supporting best-in-class service.

The new system centralizes more than 200 data elements and makes it easier than ever for advisors to meet and communicate with clients, open new accounts, and smoothly conduct business. With Ameriprise CRM, advisors can tailor their services to the preferences of individual clients – including how often they meet and the desired format for meetings.

Advisors get insights into data they care about as practice leaders, and tools to drive growth. With Ameriprise CRM, advisors can harness data to better operate their practices. They can oversee their practices' workflows, assign tasks to staff members, customize reports and dashboards, and track interactions with individual

clients or their entire book of business. In addition, the enhanced system gives advisors new tools to market and grow their practices. For example, the “Campaigns” feature allows them to manage invitations and RSVPs, ensuring they have the desired turnout for marketing events and promotions.

The conversion to Ameriprise CRM has been a priority for the company and will be completed by year-end. For more information about Ameriprise, visit **Ameriprise.com**. To learn more about becoming an Ameriprise advisor, visit **joinameriprise.com**.

About Ameriprise Financial

At Ameriprise Financial, we have been helping people feel confident about their financial future for more than 125 years. With extensive asset management, advisory 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**.

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¹Ameriprise was rated #1 in the investment industry for customer service. Rating based on responses to a consumer survey as part of the Temkin Group’s 2017 Customer Service Ratings, **www.temkinratings.com**. The Temkin Customer Service Ratings (TCSR) is an openly available benchmarking metric for a critical customer interaction. The TCSR is based on consumer feedback of their recent interactions with companies. Consumers are asked to rate how satisfied they are with recent customer service experiences. Responses are on a scale from 1= “very dissatisfied” to 7= “very satisfied,” TCSR is calculated by taking the percentage of consumers that gave a rating of 6 or 7 and subtract the percentage that gave a rating of 1, 2, or 3.

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