



NEWS RELEASE

California Credit Union Partners with Ameriprise Financial to Expand and Enhance its Investment Solutions

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MINNEAPOLIS--(BUSINESS WIRE)-- Ameriprise Financial (NYSE: AMP) today announced that California Credit Union has moved its investment program to the Ameriprise Financial Institutions Group (AFIG). Serving more than 165,000 members with 25 branches across Southern California, California Credit Union selected the Ameriprise Financial platform to enhance and expand its investment solutions offering for its members. With 11 financial advisors located in San Diego and Los Angeles, the investment program currently manages \$750 million in brokerage assets.

To reflect its newly expanded services, the credit union has rebranded its investment group to California Credit Union Wealth Management, a financial advisory practice of Ameriprise Financial Services, LLC.

"We're always focused on finding new ways to deliver personalized products, convenient services, and leading technologies to support our members through every aspect of their financial journey. Our partnership with Ameriprise Financial significantly enhances our investment solutions, helping members achieve their goals through a broad array of investment products, an improved digital experience, and financial planning tailored to their unique needs," said California Credit Union CEO Steve O'Connell. "We're excited to share the many benefits of this partnership with our members, and we are confident we have the best possible expertise, technology and resources behind us with Ameriprise Financial."

Through the new relationship with Ameriprise Financial, California Credit Union members have access to personalized advice paired with financial planning solutions and robust investment products that are tailored to their individual needs and goals. Digital capabilities power the experience, enabling credit union members to

connect with their financial advisors where and how they want – face-to-face, online, video or phone meetings.

“As a long-standing leader in financial planning, we’re thrilled to bring our powerful advice offering to California Credit Union,” said Jay McAnelly, Group Vice President, AFIG. “Our unique advice approach - combined with our breadth of investment products, digital tools, and end-to-end support -- will position California Credit Union to effectively help more of its members plan for the future.”

Ameriprise Financial formed its financial institutions channel after acquiring Investment Professionals, Inc. (IPI) in 2017. AFIG specializes in the on-site delivery of investment programs to banks and credit unions.

About California Credit Union

California Credit Union is a federally insured, state-chartered credit union founded in 1933 that serves public or private school employees, community members and businesses across California. With more than 165,000 members and assets of over \$4 billion, California Credit Union has 25 branches throughout Los Angeles, Orange and San Diego counties. The credit union operates in San Diego County as North Island Credit Union, a division of California Credit Union. California Credit Union offers a full suite of consumer, business and investment products and services, including comprehensive consumer checking and loan options, personalized financial planning, business banking, and leading-edge online and mobile banking. Visit ccu.com for more information, or follow the credit union on Instagram® or Facebook® @CaliforniaCreditUnion.

About Ameriprise Financial

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

Not Federally Insured	No Financial Institution Guarantee	May Lose Value
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Ameriprise Financial cannot guarantee future financial results.

Investment advisory products and services are made available through Ameriprise Financial Services, LLC, a registered investment adviser



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