



NEWS RELEASE

Nine Out of Ten Advisors Joining Ameriprise Say Technology, Financial Planning Capabilities and Ability to Serve and Acquire Clients is Better Than Prior Firm

2022-01-19

Advisors also say the firm's resources deepened their relationships with clients

MINNEAPOLIS--(BUSINESS WIRE)-- 90% of advisors who recently joined Ameriprise Financial, Inc. (NYSE: AMP) say they have better client-facing technology, financial planning capabilities, and ability to serve and acquire clients now than they did with their prior firms, according to a survey the company recently conducted. The Ameriprise "Ultimate Advisor Partnership" survey of nearly 300 experienced advisors who moved their practices to Ameriprise in the last 5 years from wirehouses, regional firms, independents, banks, and insurance companies uncovered:

90% of advisors who recently joined Ameriprise Financial, Inc. (NYSE: AMP) say they have better client-facing technology, financial planning capabilities, and ability to serve and acquire clients now than they did with their prior firms, according to a survey the company recently conducted. The Ameriprise "Ultimate Advisor Partnership" surveyed nearly 300 experienced advisors who moved their practices to Ameriprise in the last 5 years from wirehouses, regional firms, independents, banks, and insurance companies. (Photo: Business Wire)

- 91% believe Ameriprise elevates the client experience.
- 90% find client-facing technology better than their previous firm.
- 91% find Ameriprise's financial planning capabilities are better than their previous firm.
- 95% say Ameriprise supports deeper client relationships through financial planning and advice.
- 91% find client acquisition support better than their previous firm.



- 91% believe Ameriprise enables them to run their practice in a way that aligns with their values.
- 90% find Ameriprise's firm culture to be better than their previous firm.
- Advisor-facing and client-facing technology and financial planning capabilities are the most appreciated resources.

Advisors joining Ameriprise deliver an even better experience to their clients

Advisors surveyed gave high marks to Ameriprise's technology, financial planning, and culture. The vast majority of advisors reported they were able to foster deeper relationships with clients through the use of these resources. Since becoming an independent public company in 2005, Ameriprise Financial has invested more than \$5 billion in the firm, building powerful tools, capabilities, products, and acquisitions to enhance the financial planning experience and make it easier than ever for its advisors to serve clients.

"Ameriprise is a longstanding leader in serving clients through goal-based advice, having pioneered the financial planning process in the 1970s," said **Pat O'Connell, Executive Vice President** of the firm's branch advisor and financial institutions channels. "We put a stake in the ground a few years ago to ensure every client gets exceptionally high service in every interaction with their advisor and the firm, through what we call the Ameriprise Client Experience. We are pleased to see advisors joining our firm recognize our unwavering commitment to helping clients achieve their goals."

New Ameriprise advisors gave high marks to the firm's support to run their practices

The survey revealed that new advisors appreciate the culture and support Ameriprise provides to help them manage their practices according to their values. 86% said the firm's support has helped grow their practice, 84% said the firm's practice management support is best-in-class, and 95% were very pleased with the way the firm helped them manage their business and continue serving clients through the pandemic. Additionally, 88% of advisors said the support they receive from Ameriprise's leadership is better than their prior firm.

Ameriprise offers a proven strategy – **the Ultimate Advisor Partnership** – to help advisors unleash the power of financial planning, deliver an outstanding client experience and grow their practices at rates that outpace key competitors. Combined with the company's culture of support and independence, the strategy enables advisors to scale their businesses, deepen client relationships, and drive referrals for future growth.

Bill Williams, Executive Vice President of the firm's independent advisor channel, added, "Advisors want to be with a firm that supports the way they do business amid an ever-changing industry. Ameriprise is a true partner to advisors, helping them create efficiencies and capitalize on growth opportunities. The positive feedback from this survey is another indicator that our partnership is working."

Ameriprise continues to attract experienced, productive advisors, with approximately 1,700 joining the firm in the last 5 years.¹ To find out why experienced financial advisors are joining Ameriprise, visit ameriprise.com/why.

About the survey

Ameriprise asked experienced advisors who moved their book of business to the firm in the last one-to-five years to compare its support, resources, and capabilities to their previous firm and state their satisfaction with their experience. The survey results identified the top ways Ameriprise stands out compared to competitors. 294 advisors responded to the “Ultimate Advisor Partnership” survey, which was conducted in November 2021.

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 10,000 financial advisors, we have the strength and expertise to serve the full range of individual and institutional investors' financial needs.

Ameriprise Financial Services, LLC is an Equal Opportunity Employer.

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¹ Ameriprise Financial 2020 10-K.

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Source: Ameriprise Financial, Inc.