

## Company Overview

Ameriprise Financial has more than 115 years of helping clients plan for and achieve their financial goals.

Based in Minneapolis, Ameriprise Financial is a leading financial planning and services company with approximately 10,000 financial advisors. We specialize in meeting the retirement-related financial needs of the mass affluent and affluent and provide solutions for asset accumulation, income management and insurance protection. Our financial advisors deliver tailored solutions to clients through a personalized approach to financial planning and advice built on long-term relationships.

## Primary Businesses:

Advice & Wealth Management, Asset Management, Annuities and Protection

### Key Subsidiaries:

#### Broker-Dealers:

- Ameriprise Financial Services, Inc.
- American Enterprise Investment Services, Inc.
- RiverSource Distributors, Inc.

#### Asset Management

- Columbia Management Investment Advisers, LLC
- Threadneedle Asset Management Holdings Sàrl

#### Insurance/Annuities:

- RiverSource Life Insurance Company
- RiverSource Life Insurance Co. of NY
- IDS Property Casualty Insurance Company

#### Banking and Deposit:

- Ameriprise Bank, FSB
- Ameriprise Certificate Company
- Ameriprise Trust Company

### Operational Centers:

#### Ameriprise Financial, Inc.

Minneapolis, New York, Phoenix

#### Columbia Management Investment Advisers, LLC

Boston, Minneapolis, New York, Los Angeles, Palo Alto, Calif.

#### Threadneedle Investments

London

#### RiverSource Life Insurance Company

Minneapolis

#### RiverSource Life Insurance Co. of New York

Albany, N.Y.

#### Ameriprise Auto & Home Insurance

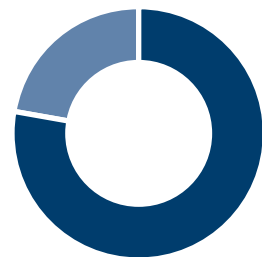
DePere, Wis.

## Key Facts

Data as of June 30, 2011

**Founded:** 1894  
**Headquartered:** Minneapolis  
**Stock Ticker:** NYSE: AMP

### 9,663 Advisors



- Franchise: 7,517
- Employee: 2,146

## Credentials:

- Leading financial planning company in the United States<sup>1</sup>
- More people come to Ameriprise for financial planning than any other company<sup>2</sup>
- Ranked #246 of the Fortune 500<sup>3</sup>
- Eighth largest manager of long-term U.S. mutual fund assets<sup>4</sup>
- Largest number of CERTIFIED FINANCIAL PLANNER™ professionals among any retail advisory force<sup>5</sup>
- Fifth largest branded advisor force<sup>6</sup>
- \$670 billion in assets under management and administration<sup>7</sup>
- One of the largest mutual fund advisory programs in assets<sup>8</sup>
- A leading annuity and variable universal life insurance provider<sup>9</sup>

See sources and disclosures on page 4.

## 2010 Financial Highlights

(in millions, except per share amounts and as noted)

(reflects Securities America reported as discontinued operations)

<b>GAAP</b>	<b>2010</b>	<b>2009</b>	<b>% Change</b>
Net revenues	\$9,512	\$7,397	29%
Net income attributable to Ameriprise Financial	\$1,097	\$722	52%
Net income from continuing operations attributable to Ameriprise Financial	\$1,121	\$721	55%
Earnings from continuing operations per diluted share attributable to Ameriprise Financial common shareholders	\$4.27	\$2.95	45%
Return on equity from continuing operations excluding accumulated other comprehensive income, net of tax	11.6%	8.9%	
Shareholders' equity from continuing operations excluding accumulated other comprehensive income, net of tax	\$10,066	\$8,903	13%
<b>Operating</b>	<b>2010</b>	<b>2009</b>	<b>% Change</b>
Net revenues	\$9,117	\$7,322	25%
Earnings	\$1,188	\$790	50%
Earnings per diluted share	\$4.53	\$3.23	40%
Return on equity excluding CIEs and accumulated other comprehensive income, net of tax	12.9%	9.7%	
Assets under management and administration (in billions)	\$647	\$429	51%
Weighted average common shares outstanding — diluted	262.3	244.4	7%
Cash dividends paid per common share	\$0.71	\$0.68	4%
Common stock share repurchases	13.1	0	
Average S&P 500 Index	1,139	948	20%
Ameriprise Financial common stock price — year ending	\$57.55	\$38.82	48%

The 2010 Financial Highlights contain certain non-GAAP financial measures that management believes best reflect the underlying performance of our operations. Reconciliations of non-GAAP financial measures to the most directly comparable GAAP financial measures are below.

(in millions)	2010	2009	(in dollars)	2010	2009	(in millions)	2010	2009
Reported net income (loss)	\$1,097	\$722	GAAP earnings per diluted share	\$4.27	\$2.95	Net income from continuing operations attributable to Ameriprise Financial	\$1,121	\$721
Realized net (gains) losses, after-tax <sup>(1)</sup>	(22)	(34)	Adjustments	0.26	0.28	Operating earnings	1,188	790
Integration and restructuring charges, after-tax <sup>(1)</sup>	73	64	Operating earnings per diluted share	\$4.53	\$3.23	Shareholders' equity <sup>(2)</sup>	10,309	7,795
Market impact on variable annuity guaranteed living benefits, after-tax <sup>(1)</sup>	16	39				Less assets and liabilities held for sale <sup>(2)</sup>	102	100
(Income) loss from discontinued operations, after-tax	24	(1)	(in millions)	2010	2009	Less AOCI, net of tax <sup>(2)</sup>	540	(413)
Operating earnings	\$1,188	\$790	Reported net revenues	\$9,512	\$7,397	Equity from continuing operations excluding AOCI	\$9,667	\$8,108
			CIE impact	(362)	(22)	Less equity impacts attributable to the consolidated investment entities <sup>(3)</sup>	455	—
			Realized net (gains) losses	(33)	(53)	Operating equity	\$9,212	\$8,108
			Operating net revenues	\$9,117	\$7,322	Return on equity from continuing operations, excluding AOCI	11.6%	8.9%
						Operating return on equity excluding CIEs and AOCI	12.9%	9.7%

<sup>(1)</sup> After-tax is calculated using the statutory tax rate of 35%.

<sup>(2)</sup> Equity, assets and liabilities held for sale, and AOCI are calculated using a five point average for the last five quarters.

<sup>(3)</sup> The adjustment for 2010 reflects a five point average of appropriated retained earnings of the CIEs for the last five quarters.

# Ameriprise Financial Executive Leadership Team

## **James M. Cracchiolo**

Chairman and Chief Executive Officer

## **Walter S. Berman**

Executive Vice President

Chief Financial Officer

## **Deirdre Davey McGraw**

Executive Vice President

Corporate Communications and  
Community Relations

## **Donald E. Froude**

President

The Personal Advisors Group

## **Crispin Henderson**

Chief Executive Officer

Threadneedle Asset Management  
Holdings Sàrl

## **Kelli A. Hunter**

Executive Vice President

Human Resources

## **John C. Junek**

Executive Vice President

General Counsel

## **Glen Salow**

Executive Vice President

Service Delivery and Technology

## **Kim M. Sharan**

President

Financial Planning and Wealth  
Strategies and Chief Marketing Officer

## **Joseph E. Sweeney**

President

Advice & Wealth Management  
Products and Services

## **William F. Truscott**

CEO, U.S. Asset Management and

President, Annuities

## **John R. Woerner**

President

Insurance and Chief Strategy Officer



## **Financial Planning | Retirement | Investments | Insurance | Banking**

Ameriprise Financial

2214 Ameriprise Financial Center, Minneapolis, MN 55474

ameriprise.com

<sup>1</sup> Ameriprise helped pioneer the financial planning process more than 30 years ago. We have more financial planning clients and more CERTIFIED FINANCIAL PLANNER™ professionals than any other company in the U.S. based on data filed at [adviserinfo.sec.gov](http://adviserinfo.sec.gov) and documented by the Certified Financial Planner Board of Standards, Inc. as of Dec. 31, 2010.

<sup>2</sup> Based on the number of financial plans annually disclosed in Form ADV, Part 1A, Item 5, available at [adviserinfo.sec.gov](http://adviserinfo.sec.gov) as of Dec. 31, 2010.

<sup>3</sup> FORTUNE Magazine, May 3, 2011

<sup>4</sup> Source: ICI Complex Assets through 2Q 2011

<sup>5</sup> Source: Certified Financial Planner Board of Standards, Inc.

<sup>6</sup> Based on company filings through 4Q 2010.

<sup>7</sup> As of June 30, 2011

<sup>8</sup> Source: Cerulli Edge - US Managed Accounts 4Q 2010 edition, data as of 3Q 2010

<sup>9</sup> Sources: Top 10 positions based on assets. Morningstar Annuity Research Center, Variable Annuity Sales and Asset Survey, 3Q 2010; Towers Watson VALUE™ Survey, as of 4Q 2010

Investment products are not federally or FDIC-insured, are not deposits or obligations of, or guaranteed by any financial institution, and involve investment risks including possible loss of principal and fluctuation in value.

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RiverSource Distributors, Inc. (Distributor), Member FINRA. Insurance and annuity products are issued by RiverSource Life Insurance Company and in New York, by RiverSource Life Insurance Co. of New York, Albany, New York. Only RiverSource Life Insurance Co. of New York is authorized to sell insurance and annuities in New York.

Securities products offered through Columbia Management Investment Distributors, Inc., member FINRA. Advisory services provided by Columbia Management Investment Advisers, LLC.

Threadneedle International Limited is an FSA- and an SEC-registered investment adviser, based in the U.K.

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Securities products offered through Columbia Management Investment Distributors, Inc., member FINRA. Advisory services provided by Columbia Management Investment Advisers, LLC.

Columbia Management, RiverSource and Threadneedle are all part of Ameriprise Financial, Inc.



## Key facts & milestones

1894	John Tappan founded Investors Syndicate.
1937	Company assets reached \$100 million.
1940	Investors Syndicate entered the Mutual Fund market in partnership with Investors Mutual.
1949	Investors Syndicate changed its name to Investors Diversified Services, Inc. (IDS).
1958	IDS Life Insurance was created.
1984	American Express completed acquisition of IDS Financial Services.
1986	IDS acquired Wisconsin Employers Casualty Company of Green Bay, Wisconsin and renamed it IDS Property Casualty Insurance Company.
1994	IDS reached \$100 billion in assets and conducted business under the American Express brand.
2003	American Express Financial Corporation completed acquisition of London-based Threadneedle Asset Management Holdings Ltd.
2005	American Express announced plan to spin off American Express Financial Corporation into an independent company.
Aug. 1, 2005	American Express Financial Corporation officially changed its name to Ameriprise Financial, Inc.
Sept. 30, 2005	Ameriprise Financial, Inc. separated from and is no longer owned by American Express Company.
Oct. 3, 2005	Ameriprise Financial stock (AMP) officially listed and traded on the NYSE.
April 2007	Ameriprise Financial debuts at No. 297 on the FORTUNE 500® *
2008	Ameriprise Financial completes acquisitions of H&R Block Financial Advisors and J. & W. Seligman & Co.
2010	Ameriprise Financial completes acquisition of Columbia Management from Bank of America

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\* Source : *FORTUNE Magazine*, April 30, 2007

# James M. Cracchiolo

## Chairman and Chief Executive Officer

James (Jim) Cracchiolo has been Chairman and Chief Executive Officer of Ameriprise Financial since September 2005, when the company, American Express Financial Advisors, completed its spin-off from American Express.



Cracchiolo has more than 25 years experience in financial services. Prior to his current role, he held a number of senior-level positions at American Express, including:

- Group President, American Express Global Financial Services 2000-2005
  - Chairman, CEO and President of American Express Financial Advisors
  - Chairman of American Express Bank
  - CEO of Travel Related Services
  - Chairman of Threadneedle Asset Management Limited 2003-Present
- President and CEO of Travel Related Services (TRS) International 1998-2000
- President of Global Network Services 1997-1998
- Senior Vice President of TRS Quality, Global Reengineering 1993-1997
- Executive Vice President and Chief Financial Officer of Shearson Lehman Brothers (then a unit of American Express) 1990-1993

Cracchiolo is a member of the Business Roundtable, the Financial Services Roundtable, the Minnesota Business Partnership and the American Council of Life Insurers. He also serves on the Board of Advisors to the March of Dimes Foundation.

Jim holds a bachelor's degree in accounting and economics and a master's of business administration degree in finance, both from New York University Stern School of Business. He is a licensed Certified Public Accountant in New York State. He is also Series 7 and 24 certified in the United States.

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# William F. Truscott

**CEO, U.S. Asset Management & President, Annuities --  
Ameriprise Financial**

William "Ted" Truscott, CEO, U.S. Asset Management & President, Annuities for Ameriprise Financial, joined the company in August 2001. Truscott is responsible for managing the firm's retail, institutional and owned asset portfolios, including the Columbia Management family of mutual funds, collective funds, institutional and retail separate accounts and alternative investments. He is also responsible for the management of the RiverSource Annuities business.



Based in Boston, Columbia Management has investment operations in key U.S. locations, including Minneapolis, New York, Chicago, Portland, Ore., and Menlo Park, Calif. Threadneedle Investments, based in London, constitutes the international investment platform of Ameriprise Financial.

Before joining the company, Truscott was chief investment officer with Zurich Scudder Investments, Americas, and managing director — Zurich Scudder Investments. Truscott joined Scudder, Stevens & Clark in 1992 as a portfolio manager and equity research analyst, focusing on Latin American countries and securities.

Prior to Scudder, Truscott was with Chemical Bank from 1983 to 1992, first as a credit analyst and banking officer covering Asian banks and corporations at Chemical Bank. Later, Truscott joined Chemical's LDC Structured Finance Group, concentrating on the creation and management of Chemical's debt/equity swap portfolio in Latin America.

Truscott is on the Board of Governors of The Investment Company Institute (ICI) in addition to serving on several boards across the Columbia Management, Threadneedle and Ameriprise businesses.

Truscott earned a bachelor's degree in East Asian studies from Middlebury College and a master's of business administration in Finance from New York University, Stern School of Business.

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# Joseph Sweeney

## President – Advice & Wealth Management Products and Services

Joseph (Joe) Sweeney's overall responsibility includes the company's brokerage, managed products, consumer banking, personal trust, information management, Ameriprise Advisor Center (AAC), privacy office and home & auto insurance areas. In 2005, he led the operations effort for the transition of Ameriprise to an independent, publicly traded company.

Sweeney joined American Express, former parent company of Ameriprise Financial, in 1983 and has served in a number of senior leadership positions across the firm, including:

- President, Financial Planning, Products and Services, Ameriprise Financial, Inc 2005-2009
- Senior vice president and general manager of Banking, Brokerage and Managed Products, American Express Financial Advisors 2003-2005
- Senior vice president of Business Transformation, Global Financial Services, American Express 1998-2003
- Vice president of Business Processes, Global Network Services, American Express 1997-1998
- Vice president of Quality and Reengineering, Travel Related Services, American Express 1995-1997



He serves on the board of directors for American Enterprises Investment Services and the Securities Industry and Financial Markets Association (SIFMA). He is also a member of the SIFMA private client group steering committee and currently chairs the board of directors for Ameriprise Bank, FSB. He earned a bachelor of arts degree, magna cum laude, in economics from Saint Anselm College in Manchester, N.H.

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# Walter S. Berman

## Executive Vice President and Chief Financial Officer

Walter Berman is responsible for generating measurable improvements to our firm's shareholder value through initiatives that mitigate operational and strategic risk, free up capital, maximize the balance sheet and effectively manage the firm's tax rate. Berman provides the financial community and shareholders with a thorough understanding of Ameriprise Financial business and helps ensure the integrity of data and reporting.

Berman joined American Express, the former parent company of Ameriprise Financial, in 1965 and served until 1996 in various positions, including Senior Vice President and Treasurer of American Express Travel Related Services (TRS), Chief Financial Officer of American Express International, Chief Financial Officer of TRS and American Express treasurer.

He left the company in 1996 and held senior financial positions at other major companies, including Treasurer of IBM. He returned to the company in 2001.

Berman serves on the Threadneedle Investments Board of Directors and is a member of the CFO Roundtable.

He earned a bachelor's degree in accounting from Brooklyn College.

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# Kim M. Sharan

**President – Financial Planning and Wealth Strategies, Chief Marketing Officer**

Kim Sharan oversees the company's integrated approach to serving current clients and reaching prospects. She is responsible for the overall marketing strategy (including brand management, advertising and client communications) and financial planning.

Sharan is a veteran in the financial services industry with 30 years of experience in markets across the globe. She joined Ameriprise in 2002 after holding a number of senior leadership and management positions at Merrill Lynch and Citibank.

Sharan also serves on a number of philanthropic boards focused on educating, empowering and inspiring future female leaders. She has been named one of the Top 100 Women in Corporate America by Women 3.0 Magazine and one of the Top 25 Women to Watch by the Minneapolis/St. Paul Business Journal.

She earned a bachelor's degree in economics from Drew University and a master's of business administration degree from the University of Chicago Graduate School of Business.



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# John C. Junek

## Executive Vice President and General Counsel

John Junek is responsible for the direction and oversight of the Legal and Compliance departments of the firm consisting of more than 300 professionals responsible for managing legal and regulatory risks of its businesses. Junek is also responsible for the firm's Corporate Governance, Security and Aviation units.

Junek has more than 30 years of experience providing counsel for the financial services industry, the majority of those years with Ameriprise Financial. Junek served for nearly 10 years as the deputy general counsel of American Express Travel Related Services (TRS) where he was primarily responsible for the groups that supported the international payment and consumer financial services businesses of American Express.



Prior to his role with Travel Related Services, Junek was the general counsel of American Express Ltd., a position he held from 1986 to May of 1990. In 1982, Junek was Vice President and Managing Counsel for Regulation and Compliance with Crocker National Bank in San Francisco. He left Crocker to rejoin American Express in New York in February 1985.

He began his career with American Express as a staff lawyer in 1978 after five years as a regulatory staff lawyer with the Federal Reserve Bank of New York where his responsibilities included enforcement of the Fed's margin lending regulations.

Junek is also a member of the Board of Directors and Executive Committee of the Guthrie Theater. He is a member of the bar in California and New York.

He is a graduate of Yale University and the University of Virginia School of Law.

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# Glen Salow

## Executive Vice President – Service Delivery and Technology

Glen Salow is executive vice president (EVP) of Service Delivery and Technology for Ameriprise Financial, Inc. Salow joined the company in May 2005.

In this role, Salow is responsible for an integrated state-of-the-art technology and service delivery organization that enables Ameriprise to accelerate its growth through an optimal advisor and client experience. He leverages this organization to create competitive advantage and to achieve best-in-class economics for the firm.



After leading the company's separation from American Express, Salow upgraded service and technology to simplify tools and increase the ease of doing business. Under his leadership, Ameriprise launched a new, streamlined advisor workstation, strengthened capabilities upon the acquisition of H&R Block Financial Advisors and Columbia Management and delivered significant margin improvements. He continues to focus on reliable, simple, integrated and collaborative systems and service for the delivery of major projects, including the comprehensive replacement of the brokerage platform and integration of Columbia Management.

Before joining the company, Salow was executive vice president and chief information officer (CIO) of American Express Company, a position he assumed in March 2000, after holding the role of senior vice president in the organization since 1997. As CIO, he advanced the company to become one of the most strategic users of adaptive technology in the financial services market sector and led the signing of a \$4 billion technology-on-demand agreement with IBM to improve the company's infrastructure. Prior to American Express, Salow held several senior leadership roles before serving as CIO of Aetna Retirement Services, a division of Aetna Life and Casualty.

Salow serves on the Technology Advisory Board of New York Presbyterian Hospital. Salow earned a bachelor's degree in accounting and holds a master's of business administration from Monmouth University.

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# John R. Woerner

## President – Insurance and Chief Strategy Officer

John Woerner is President of Insurance and Chief Strategy Officer for Ameriprise Financial after joining the company in 2005.

Woerner is responsible for leading the development and implementation of strategic programs designed to grow Ameriprise's business. Woerner works with senior leaders to create strategies designed to accelerate profitable growth and market share gains for the company.

Prior to joining Ameriprise, Woerner was with McKinsey and Company, where he was a leader of its North American Asset Management, Brokerage and Wealth Management practice. Woerner was at McKinsey for 10 years, and was elected partner in 2000. While at McKinsey, he developed in-depth knowledge and experience in creating and executing financial services strategies. Woerner has developed and implemented a range of comprehensive programs including domestic and international asset management expansion, performance improvement, and retirement strategies. He began his career at Goldman, Sachs as a financial analyst.

Woerner holds a bachelor's degree from Pennsylvania State University and a master's of business administration from the Wharton School at the University of Pennsylvania. He is a member on the National Endowment for Financial Education (NEFE) board.



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# Kelli A. Hunter

## **Executive Vice President – Human Resources**

Kelli Hunter joined Ameriprise Financial in June 2005. Hunter develops enterprise-wide learning strategy and performance management and succession planning processes that align with the company's strategic objectives.

Prior to joining Ameriprise, Hunter was senior vice president – Global Human Capital, for Crown Castle International Corporation in Houston. Hunter also held a variety of senior level roles in human resources for Software Spectrum, Inc., Mary Kay, Inc., where she gained experienced working with a large franchise sales organization, as well as Morgan Stanley and Bankers Trust New York Corporation.



Hunter holds a bachelor's degree in political science from the University of New Hampshire.

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# Deirdre McGraw

## **Executive Vice President – Corporate Communications and Community Relations**

Deirdre McGraw is responsible for corporate communications to more than 20,000 employees and advisors and external communications with shareholders, the public and media. She and her team are responsible for ensuring that consistent and effective messages are delivered to Ameriprise financial advisors, employees and external stakeholders. McGraw is also accountable for the company's state government affairs efforts, and national and local community relations and philanthropic programs.



McGraw has more than 18 years of marketing and communications experience with financial services companies. McGraw joined Ameriprise Financial in 2000 as a member of the Chairman and CEO's office working on enterprise-wide initiatives, business planning, organizational effectiveness and Chairman's communications. Before joining Ameriprise, McGraw held leadership positions at American Express in Global Financial Services, TRS International and Establishment Services.

She has a bachelor's degree in American studies from Lehigh University in Bethlehem, Pa.

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# Donald E. Froude

## President – The Personal Advisors Group

Don Froude joined Ameriprise Financial in September 2008 as president of The Personal Advisors Group. He has significant experience and expertise in broker-dealer and institutional services, as well as wholesaling and product development. In this role, Froude is responsible for continuing to drive growth and productivity across our advisor force and leading the integration of Ameriprise Advisor Services, Inc.



Prior to joining Ameriprise Financial, Froude was managing director and head of U.S. Distribution for Legg Mason, Inc., where he managed sales, marketing, client service, and product and business development efforts throughout the United States. He also led efforts to grow both the retail and institutional businesses beyond their proprietary roots, working with Merrill Lynch, LPL, Raymond James, Ameriprise Financial and other firms. He served on Legg Mason's Operating and Global Wealth Management Committees.

Froude also worked for Intermediary Distribution for Columbia Management, the asset management company of Bank of America, where he helped integrate two large mutual fund companies into one organization. Prior to that, he was president and chief executive officer of Quick & Reilly, where he re-built the traditionally discount brokerage into a full-service investment business. Earlier in his career, Don worked at Quick & Reilly, Alex Brown/Bankers Trust/Deutsche Bank and spent nine years as a broker and office manager at Bache Halsey Stuart/Prudential.

Froude attended the College of the Holy Cross in Worcester, Mass. where he earned a bachelor of science degree in sociology.

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# Crispin Henderson

## Chief Executive Officer – Threadneedle Asset Management Holdings

Crispin Henderson is chief executive officer at Threadneedle Investments and handles the management of Threadneedle with accountability to the Board. He joined the company in 2002 as Chief Operating Officer, leading the finance, operations, administration and IT functions that have helped to earn Threadneedle its reputation for professionalism.

Before becoming Managing Director in 2006, Crispin chaired Threadneedle's Strategic Alliances Business Management Team. He then became Chief Executive in 2007 and is responsible for the overall management of Threadneedle.



Before joining Threadneedle, he spent 35 years at PricewaterhouseCoopers and its predecessor firms and 25 of these years as a Partner. Crispin specialized in providing consulting, advisory and audit services to major financial services clients.

Crispin is a Fellow of the Institute of Chartered Accountants in England and Wales, the Association of Chartered Certified Accountants and the Chartered Institute of Marketing.

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# David M. Joy

## Chief Market Strategist, Ameriprise Financial

David Joy is chief market strategist at Ameriprise Financial, Inc.

Joy is a frequent guest on CNBC, Bloomberg TV and Fox Business Network and has been widely quoted in various publications including *The Wall Street Journal* and *USA Today*.

Joy has more than 30 years of experience in the investment management industry including senior investment positions at several industry leading firms before joining Columbia Management Investment Advisers in March of 2003.



Joy is a graduate of the College of the Holy Cross. He received his M.B.A. from Boston College's Carroll School of Management.

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# Craig Brimhall

## Vice President – Retirement Wealth Strategies

Craig Brimhall's focus is personal finance, especially the areas of retirement savings and distributions. He is an expert on current tax law changes and effects to IRAs, 401(k)s and other employer-sponsored retirement plans.

He is a frequent speaker at company events, including advisor training seminars, client education events and leadership recognition programs.

Prior to assuming his current position Brimhall served as region vice president of investments for the Virginia, Washington D.C. and Baltimore areas. As Region Vice President, Brimhall provided support and training programs for advisors, sales consultants and clients on a variety of topics including financial planning, investment strategies, stock market outlook, asset allocation, retirement and estate planning.

Brimhall joined the company as a financial advisor in 1980 and has subsequently held increasingly senior positions. Brimhall has earned these professional certifications: CERTIFIED FINANCIAL PLANNER™, Certified Fund Specialist and Chartered Retirement Planning Counselor<sup>SM</sup>. He has also earned his Series 7, 63 and 65 licenses.

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# Russell Price

## Senior Economist, Ameriprise Financial

Russell Price is the Senior Economist for Ameriprise Financial.

Price is a frequent commentator for *Bloomberg*, *BusinessWeek* and *Reuters* and has appeared in many other media outlets. He was recently cited by Bloomberg Financial as a “Bloomberg Best” for being one of the most accurate economic forecasters in their benchmark consensus survey.

Prior to joining Ameriprise Financial, Price was the senior economist for H&R Block Financial Advisors for seven years. He was also a generalist equity research analyst for more than six years with research coverage including companies such as Caterpillar, John Deere, Hewlett-Packard and Dell Computer.



Price holds bachelor’s degree in economics from East Stroudsburg University, and an M.B.A in finance and investments from Marywood University. He also holds the Chartered Financial Analyst (CFA) designation.

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## **News media contacts**

### **Personal Finance, Retirement, Community Involvement Stacy Housman**

Director, Media Relations  
612.678.7215  
612.671.5112 (fax)  
[stacy.m.housman@ampf.com](mailto:stacy.m.housman@ampf.com)

### **U.S. Financial Advisor Group, Wealth Management Chris Reese**

Director, Media Relations  
612.678.5410  
612.671.5112 (fax)  
[chris.l.reese@ampf.com](mailto:chris.l.reese@ampf.com)

### **U.S. Financial Advisor Group, Markets and Economy Kathleen McClung**

Manager, Media Relations  
612.678.1069  
612.671.5112 (fax)  
[kathleen.h.mcclung@ampf.com](mailto:kathleen.h.mcclung@ampf.com)

### **Personal Finance, Retirement Meghan Mumm**

Specialist, Media Relations  
612.671.0823  
612.671.5112 (fax)  
[meghan.l.mumm@ampf.com](mailto:meghan.l.mumm@ampf.com)

### **Asset Management, Insurance, Annuities and Retirement Ryan Lund**

Director, Media Relations  
612.671.3459  
612.671.5112 (fax)  
[ryan.s.lund@ampf.com](mailto:ryan.s.lund@ampf.com)

### **Asset Management, Insurance and Annuities Charlie Keller**

Senior Manager, Media Relations  
617.747.0462  
[charles.r.keller@ampf.com](mailto:charles.r.keller@ampf.com)

### **Shareholder Communications Paul Johnson**

Vice President, Shareholder Communications  
612.671.0625  
612.671.5112 (fax)  
[paul.w.johnson@ampf.com](mailto:paul.w.johnson@ampf.com)