



Celebrating
125 Years
of putting clients first

Ameriprise Financial at 125: Celebrate Your History!

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**THE
ANNIVERSARY
FORUM**



ANNIVERSARY
UNIVERSITY®



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Ameriprise Financial

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June 24, 2021

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Who we are

Ameriprise Financial is a longstanding leader in financial planning and advice with over \$1 trillion in assets under management and administration.

Ameriprise Financial became an independent, publicly owned company in 2005, but our story began on June 29, 1894, when John Tappan founded Investors Syndicate, investing \$5 each on behalf of 1,000 people. Since then, we've focused our businesses entirely around serving clients, building on the heritage of a distinguished history that began more than a century ago.

Today, our team of 20,000 people in 20 countries advise, manage and protect the assets and income of more than 2 million individual, small business and institutional clients.

Through our brokerage business, clients have access to multiple investment products, including real estate investment trusts and thousands of mutual funds from approximately 160 fund families.

To provide our clients a broad choice of investment products, we offer thousands of mutual funds from approximately 160 mutual fund families on a stand-alone basis and as part of our wrap accounts.

Across our businesses, we uphold our brand promise ... to shape financial solutions for a lifetime.



By the numbers

Ameriprise is a well respected and recognized global firm focused on our mission – to help people feel confident about their financial future.

\$1.1
TRILLION

\$1.1 Trillion

Ameriprise Financial exceeded \$1 trillion¹ in assets under management and administration for the first time in company history in 2020.

¹ Ameriprise Financial fourth quarter 2020 statistical supplement

#245
OF 500

FORTUNE 500®

Ameriprise Financial is ranked No. 245 on the FORTUNE 500® list published in 2020.

32nd
LARGEST

32nd largest

Ameriprise ranks as the 32nd-largest³ global asset manager.

³ Pensions & Investments/Thinking Ahead Institute World 500: World's largest money managers – Oct. 19, 2020 issue.

Top performer

Ameriprise earned a Hearts & Wallets Top Performer™ recognition⁷ in:

- “Unbiased, puts my interest first”
- “Explains things in understandable terms”
- “Understands me and shares my values”

Top 15

Top 15

RiverSource is a top 15⁴ provider of variable annuities.

⁴ LIMRA U.S. Individual Annuity Industry Sales Report – Q3 2020.

Good
FOR ALL

Operating for good

Ameriprise is a proud to be recognized as a responsible firm:

- Bloomberg Gender-Equality Index
- FTSE4Good Index Series
- Beyond the Yellow Ribbon
- Military Friendly Employer
- DivHERsity Champion by JobsForHer



Discovery



125th Anniversary Planning

June 29, 2019 marked the 125th anniversary of the founding of Ameriprise.

Start planning early: Fall 2017, attended the Anniversary Forum in Chicago, IL.

Gather external input: Throughout 2018, researched and reached out to peer companies to gather ideas and best practices and began to seed conversations with senior leaders.

Collaborate across the organization: In Dec. 2018, established a 125th Anniversary planning committee with 24 representatives from across our Internal Communications, Advertising, Marketing, Public Relations, Community Relations and Real Estate groups in the U.S., EMEA and India, where most employees work.

“Look back, don’t stare”: The planning team met several times to brainstorm how to celebrate our history and demonstrate that we are building on our strong foundation to grow and position ourselves for the future.



Planning



Three audiences, three tiers to consider

The planning team developed recommendations for our three key constituents – corporate employees, field advisors and external clients/public – divided into three tiers.



Incorporate anniversary into regular business content and existing events at low-no cost, relatively simple to create and implement



Enhance overall messaging and create more engaging experiences with additional funding, time and effort to produce



Create a few prominent, memorable experiences (“wows”) for each audience to deliver higher visibility, lasting impact and feeling of pride

Our approach included elements across all three tiers



Brainstorming from all angles

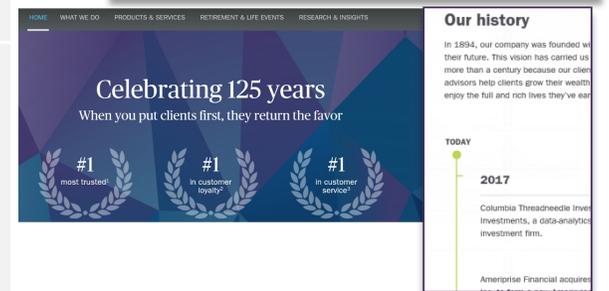
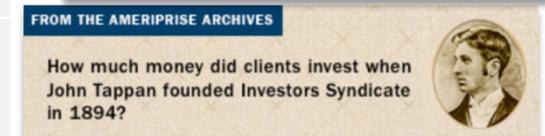
Audience	Channel	Will do (BAU)	Would like to do (enhancements)	Could do...if we had \$\$ (“wow” moments)
Executives	Messaging	125 th messages to cascade	Video message from CEO	
People leaders	Intranet	Logo/tagline on email signature for duration of 2019		
Employees	Physical space	Signage / posters for office locations	Memento/desk drop	Employee celebratory events / gatherings around the world
Advisors	Meetings and events	125 th anniversary social media messages for advisor websites and ameriprise.com	Video message from CEO Window clings in advisor offices	Branded items for advisors
Clients	Marketing and branding	125 th logo and tagline for internal and external sites	125 th anniversary celebration in new advertising	Branded client collateral with 125 th logo
Champions	Community outreach	Online scavenger hunt for employees with \$125 donation to nonprofits	Feeding America – provide 125M meals	Donation to basic needs organization in key cities
Community	PR	Bus signage in key cities	Billboards in key cities	Sponsorships
Public	Thought leaders	125 th messaging in Annual Report, Quarterly Earnings, Responsible Business Report, as appropriate		Large-scale events in large corporate office locations



Tactical planning

For our corporate, field and external audiences, we created 125th messaging and tactics, primarily weaving into our regular business content and existing events, with a few strategically placed “wow” moments

	Tactics
Corporate	<ul style="list-style-type: none"> ✓ Create 125th anniversary logo and tagline for employee intranet and all internal collateral material ✓ Incorporate 125th messaging in existing editorial content, employee town hall, and new series focused on history (From the Ameriprise Archives) and client-focus (Tales from the Front) ✓ Develop anniversary messages for executives and leaders to cascade, including CEO video ✓ Link anniversary to companywide annual events (Day of Service, week of recognition) ✓ Refresh “Our history” timeline on company intranet ✓ <i>WOW: Pop-up breakfasts for employees</i> ✓ <i>WOW: Six-week “Celebrate 125. Win \$125.” intranet challenge for global employees (values-driven)</i>
Field	<ul style="list-style-type: none"> ✓ Develop field version of 125th anniversary logo and add to field intranet ✓ Include 125th messaging in existing editorial content on advisor-facing intranet, tie to Ameriprise Client Experience messaging, Field-facing conference video and “What Ameriprise means to me” stories ✓ Link anniversary to advisor-focused annual events (day of service, week of recognition) ✓ Cascade 125th messaging to advisors via social media program and ameriprise.com ✓ Expand “Our history” timeline to field intranet ✓ <i>WOW: CEO letter to all clients</i> ✓ <i>WOW: CEO video message to field members</i>
External	<ul style="list-style-type: none"> ✓ Include 125th messaging in Annual Report, Quarterly Earnings, Responsible Business Report ✓ Reposition “Our history” on ameriprise.com for greater visibility ✓ Incorporate 125th anniversary messaging within press releases, as appropriate ✓ Promote in corporate social media and other branding opportunities ✓ <i>WOW: Year-long billboard outside service center in downtown MN</i> ✓ <i>WOW: Full-page ad in MN Star Tribune</i>



Execution



Try new approaches

MAY 13

Celebrate 125. Win \$125.

We're celebrating our anniversary by giving you a chance to win for your favorite eligible charity ... take the quiz to enter

MAY 18

Celebrate 125. Win \$125.

Complete our crossword puzzle for a chance to win!

Find out if you won last week's challenge

MAY 20

Celebrate 125. Win \$125. Scavenger Hunt

Find out if you won last week's challenge and try your hand at this week's virtual scavenger hunt

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MAY 27

125 years ... and counting

Colleagues share advice for delivering outstanding client service for 125 years



30+ 3.5+ 4+ 10+ 17+ 11+ 3+ 21+ 25+ .5+

A lot has happened in 125 years



1894-1930 1930-1955 1955-1980 1980-2005 2005-2019



CELEBRATE 125. WIN \$125 FOR YOUR FAVORITE CHARITY.

- Check out *Inside* after the town hall to learn more
- Mondays on *Inside*, from May 13 – June 17, find clues to solve the week's challenge
- Every week, 25 employees will win \$125 for the charity of their choice



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Share your story

JUN 28



Don't just take our word for it

Watch Harold, a client for 70+ years, share the impact Ameriprise has had on his life



What Ameriprise means to me

Read responses from colleagues and submit your own



Expired

Author
K. Metzger

Release
Jun 27, 2019

Expires
Jun 30, 2020

<My/Our> practice is proud to be part of Ameriprise, which has a 125-year tradition of putting clients first. <I am/We are> grateful to you for including <me/us> on your journey to reach your financial goals.



Ameriprise Financial: Helping our clients feel confident about their financial future since 1894

Dear Mike,

June 2019 marks an important milestone for Ameriprise Financial - the 125th anniversary of our founding. Ameriprise is proud to be one of a select group of public companies in the United States in business for more than a century.

Over many generations, we've helped create financial security and confidence for millions of individuals, families and institutions. From our beginnings, we were an innovator as one of the first to offer investment certificates, a product that guaranteed both principal and interest, and that we still offer. Ameriprise has grown and evolved over the decades to become a premier wealth manager and longstanding leader in financial planning and advice with a broad range of thousands of financial solutions. We remain one of the strongest companies in financial services and have nearly \$900 billion in assets under our care.¹

Key to our longevity and growth is our steadfast commitment to always putting your needs first. Our mission - *to help you feel confident about your financial future* - guides our actions every day.

The strength of our commitment to you is matched only by our strength as a business. Through market downturns, recessions, economic booms, the Great Depression and the Great Recession, we have unwaveringly stood by our clients with the resolve and resources to honor our financial obligations.

We built our business through our longstanding client relationships and have never lost sight of our promise to serve your financial needs. We work diligently every day to earn the trust you place in us. I'm pleased to share that Ameriprise is recognized as:

- #1 in the investment industry for trust²
- #1 in the investment firm category for customer service³
- #1 in the investment industry for customer loyalty⁴

On behalf of our more than 21,000 dedicated advisors and employees, thank you. We're honored to serve your financial needs. We look ahead with optimism about our future, and how we'll help you achieve your most important goals for many years to come.

Jim Cracchiolo

Chairman and Chief Executive Officer
Ameriprise Financial, Inc.



WOW: Bold advertising and branding

ameriprise.com log-in page, July 2019



Billboard outside service center, downtown Minneapolis, 2019



WOW: Strategic, meaningful messages



More than 125 years after John Tappan made his first investment on behalf of clients, we continue our legacy of helping people feel confident about their financial future.

THANK YOU for making a difference in the lives of clients, advisors, our communities and each other.

Ameriprise Financial  Celebrating 125 Years of putting clients first

115517 A (06/19)



Since 1894, we've helped people plan for their financial futures with confidence.

125 years later, we still have no plans to retire.

Along the way, our employees and advisors have truly given their all, putting the needs of our clients and communities first. For over five generations, we have remained focused on helping people feel confident, connected, and in control of their financial lives. Together, we look forward to a brilliant future.



WOW: Surprise and delight moments

Employees in major office locations were greeted with coffee, breakfast or afternoon treats in honor of our 125th anniversary. Virtual employees received electronic Starbucks gift cards so everyone could feel part of the celebration.



London, England



Green Bay, WI



HQ, MN



1 WTC, NYC



Lexington Ave, NYC

Phoenix, AZ



Gurugram, India



Houston, TX

Employee comments

- “The lobby had a very celebratory feel this a.m. and employees were very engaged in the treats and coffee!” *Vice President, NY*
- “Walking into the office today and seeing the balloons, posters, coffee and breakfast – it felt like a warm hug. Thank you!” *Director, MN*
- “THANK YOU so much for the coffee and banana this morning. That was a delightful surprise and made my Monday!” *Sr Manager, MN*
- “Thank you for breakfast and keeping the company going strong.” *Sr Product Trainer, MN*
- “THIS IS GREAT! Love the cup of coffee!” *Vice President, NC*
- “Thank you 💎” *Sr Coordinator, MA*



Results



Results: Overall anniversary engagement

84%

2019 Employee engagement
(+2 YOY and above benchmarks)

Corporate audience

- ✓ **Six-week “Celebrate 125. Win \$125.”** global intranet challenge was a hit with employees, garnering strong viewership, participation and positive unsolicited feedback. Employees appreciated the chance to give back to their communities and enjoyed the “fun” approach to business literacy with a word search, crossword puzzle and scavenger hunt. We received a total of 2,177 submissions for the six challenges. We saw a notable increase in readership and participation internationally.
- ✓ **Online historical timeline** featuring Ameriprise milestones among notable global events during that timeframe – received more than 10,000 views in less than four days on employee and field intranets. The approach brought our 125th anniversary story to life with “new and different” visuals and generated momentum as the timeline extended throughout the week. We also handed out a printed updated timeline of Ameriprise’s history in several major locations and made it available online.
- ✓ **Pop-up breakfasts** and treats were well-received and appreciated by employees in major locations and virtually.

Field audience

- ✓ **CEO messages were powerful and well received.** CEO video on field intranet received double average readership. Together with our employee intranet, the video received more than 4,400 views in 1 day. CEO letter to all clients reinforced client-focus and key credentials.
- ✓ **Homepage features** encouraged field members to share their own “what Ameriprise means to me” stories, which led to 20 field members sending their own heartwarming responses.
- ✓ **Marketing to advisors** elicited requests for more materials to share the milestone with clients.

External audience

- ✓ **Bold advertising** pushed for “new and different” with refreshed CSC billboard and full-page advertisement in the *Star Tribune*.
- ✓ **Targeted social media** through social media posts “*Legacy of putting clients first*” and “*Tradition of commitment since 1894*” resonated with registered users, surpassing 2019 engagement rates within one week of posting.



Results: Report card for employee tactics

Corporate audience		
●	Celebrate 125. Win \$125.	Six-week intranet challenge had over 2,177 participants, 181 likes, over 30 emails of “thanks for fun”
●	History timeline tile	Tile on employee intranet received 10,000+ views in 4 days
●	CEO video message	Video on employee and field intranet had more than 4,412 views in 1 day
●	It all adds up to us	Employee tips from 125 years of experience at Ameriprise was top-read intranet article after CEO video
●	Tales from the front	New series launched in Jan. 2019 focused on employees providing excellent client service; 4 features with above-average readership and over 234 likes
●	Pop-up breakfasts	Free coffee/breakfast/treats across the globe were enjoyed and appreciated
●	History poster and postcard	Revised history timeline delivered online and distributed posters to employees along with “thank you” postcard
●	Employee / leader meetings	125 th messaging included animated timeline, chocolate bars with 125 th logo, and Celebrate 125. Win \$125. promotion

This [Celebrate 125. Win \$125.] is a fantastic initiative and a great way to celebrate our anniversary. – *Institutional, London*

Thanks for the fun little event and for the community involvement, Ameriprise. – *Auditor, MN*

Thank you for the opportunity to make a difference in the lives of others via the Celebrate 125 challenge. Working for a company with such a strong commitment to the community is a reason I came to Ameriprise, and it will continue to be a driving force to keep me with the firm for years to come. Thanks again for this opportunity to support the communities I love. – *Manager, MN*

Thank you for providing this outlet to donate! - *Sr. Analyst, MA*



Results: Report card for field and external audience tactics

Field		
●	Advisor engagement	Received 20+ stories from field members sharing their Ameriprise stories upon reading reflections from execs/peers
●	History timeline tile	Field intranet: 10,000+ views in 4 days
●	CEO video message	Video on employee and field intranet had more than 4,412 views in 1 day
●	Client video	The 70+ year client video from field-facing conference was most-opened after CEO video

External audiences		
●	Client-facing materials	Advisors requested more materials to share the milestone with clients. We produced: <ul style="list-style-type: none"> • Two social media posts, which exceeded 2019 goals in less than one week • One Marking on Demand (MOD) letter, 62 advisors downloaded and sent over 10,000 emails to clients • Advisor website banner
●	Updated history poster	Increased E-catalog requests
●	CSC Billboard	Total impressions from the billboard (from June 17 to YTD) are 253,752. (Good performance; primarily created for awareness)
●	Full page advertisement	MN Star Tribune ad impressions were 865,590. (Good performance; primarily created for awareness)

I was very impressed with Mr. Cracchiolo's video.
 – Advisor, Iowa

Just viewed the video on celebrating our company's 125 years. Can this video be put into our FA profile webpage? Can this be shown or sent to clients and or prospects? Our CEO did a wonderful succinct presentation celebrating our 125 years. Thank you.
 – Advisor, NY

Is there any way to post that very cool timeline on social media through LinkedIn? I would really like to share this with others.
 – Advisor, Mo.



What we learned

Follow best practices

- ✓ **Gather stories and build excitement**
- ✓ **Provide engaging digital/online content**
- ✓ **Incorporate into existing programming**
- ✓ **Provide “emotional souvenirs”**
- ✓ **Cross-departmental planning**
- ✓ **“Look back, but don’t stare”**

Make it your own

- ✓ **Share your story:** Reinforce client-focus and commitment to community and encourage employees and advisors to share their stories
- ✓ **Try new approaches:** Drip history, gamify content, employee-generated video
- ✓ **Choose your spots to “wow”:** Pop-up breakfasts, advertising
- ✓ **Maximize channels to expand reach:** Ameriprise.com, JoinAmeriprise.com, corporate and field-facing intranets, LinkedIn, Facebook, social media program, turnkey marketing, advisor websites, meetings



Questions?





Be Brilliant.®

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