

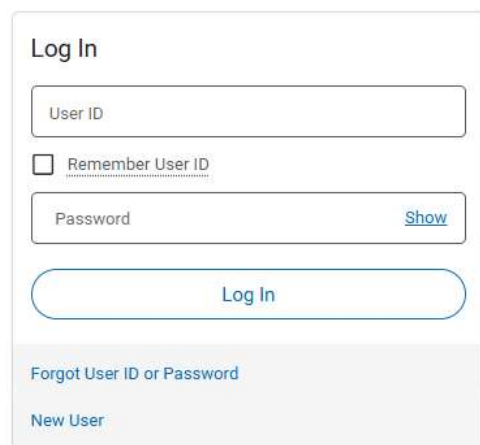
Online access to the secure site for ameriprise.com

Working together with your advisor digitally, through the secure site, will allow you to have full transparency into your accounts from any device you choose at any time and help protect your financial information.

This document contains information about:

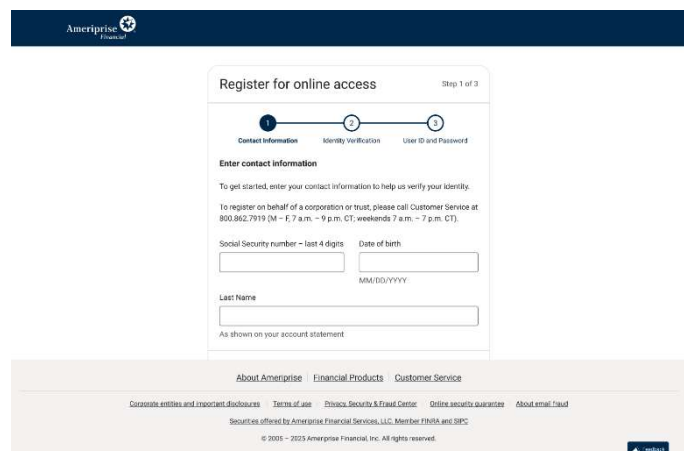
- Setting up your online access
- Secure site account overview
- Secure site benefits

Setting up your online access



The Log In form contains the following elements:

- Log In** header
- User ID
- ☐ Remember User ID
- Password with a [Show](#) link
-
- [Forgot User ID or Password](#)
- [New User](#)



The Register for online access form is titled "Step 1 of 3" and includes a progress bar with three steps: 1. Contact Information, 2. Identity Verification, and 3. User ID and Password. The current step is "Enter contact information".

To get started, enter your contact information to help us verify your identity.

To register on behalf of a corporation or trust, please call Customer Service at 800.862.7919 (M - F 7 a.m. - 9 p.m. CT; weekends 7 a.m. - 7 p.m. CT).

Fields include:

- Social Security number - last 4 digits
- Date of birth (MM/DD/YYYY)
- Last Name (As shown on your account statement)

Footer links include: About Ameriprise, Financial Products, Customer Service, Corporate entities and important disclosures, Terms of use, Privacy, Security & Fraud Center, Online security guarantees, and About email fraud.

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1. In your web browser, go to ameriprise.com/client-login
2. Select *New User*
3. Confirm you have all the correct information including:
 - Social Security number
 - Date of Birth
 - Last name as it exists on your Ameriprise Statements when you established your account(s)

4. Verify your identity by sending a one-time code to your number on file via text message or phone call
5. Create your User ID and password. You will be shown a suggested ID, you can choose this or create your own. Your User ID must:
 - Be 5-20 characters
 - Contain at least 1 letter
 - Have no spaces
 - Your password must:
 - Be 8-240 characters
 - Contain upper and lowercase letters
 - Contain at least 1 number
 - Contain at least 1 special character (e.g., !, #, \$, @)
 - Have no spaces
6. Check *User Agreement* and *Document Consent Agreement* boxes and click *Submit*
7. Add account protection by turning on 2-Step Verification

Online access registration is now complete. You will see your account overview page.

Secure Site account overview

The information below reflects using the secure site on ameriprise.com on a desktop-based browser. Screens on mobile devices are similar, but the information and menus automatically contract and format to fit the device.

Customize your page layout in Quick Actions. Using the displayed pop-up window, you can change the order of information displayed on your *Overview* page or hide certain sections. Account Summary can only be moved, not hidden.

Ameriprise Overview

Overview | Portfolio | Documents | Goals | Trade & Research | Transfers & Tools | Account Groups | My Advisor

Last visited: 11/15/2024 10:56 PM ET (All prices delayed)

Group Name: HOUSEHOLD GROUP Group ID: 0021 1859 9 001

Overview

Total Asset Value: \$14,080,720.04 | Total Cash Value: \$13,248,232.20 | Brokerage Day Change: N/A

Account Summary

Last visited: 11/15/2024 10:56 PM ET (All prices delayed) | Download table data as CSV

Cash & Investments

Combined market value \$14,080,720.04 | Today's Change N/A

ticker	Market Value	Tax Status	Day Change
IBUY	\$594,347.00	Qualified	UNCH
AMERIPRISE BROKERSHARE	\$11,022,755.86	Non-qualified	+\$339.18 / 0.00%
AMERIPRISE BROKERSHARE	\$20,058.00	Non-qualified	+\$191.36 / 0.94%
AMERIPRISE BROKERSHARE	\$239.00	Non-qualified	UNCH
AMERIPRISE BROKERSHARE	\$1,195,562.30	Non-qualified	UNCH
AMERIPRISE BROKERSHARE	\$195,369.01	Non-qualified	UNCH
AMERIPRISE BROKERSHARE	\$104,819.95	Non-qualified	UNCH

Quick Actions

- Customize page layout
- Make a one-time transfer
- Upgrade account ownership

Ameriprise Bank Savings Account

Reach your savings goals with the Ameriprise Bank Savings account. Learn more and see our competitive rates. Ameriprise Bank, FSB. Member FDIC.

Customize page layout

Select what you want to show on your overview page, then move into the order that works for you.

Show/hide | Change order

- ☒ Account Summary
- ☒ Portfolio Progress
- ☒ Recent Activity
- ☒ Total View
- ☒ Markets
- ☒ News & financial insights
- ☒ Goals Marketing
- ☒ Watchlist
- ☒ Advisor Information

Apply | Cancel | Reset Layout

Benefits of online access

Be sure to explore all the tools and features of the secure site that can help you manage your account and stay connected with your advisor in a variety of ways:



Use 2-Step Verification

Get extra login security with a second layer of protection



Activate text alerts

Help prevent fraud and stay informed with timely notifications



Choose paperless

Receive your important financial documents online



Set up Total View

See your total financial picture at a glance

[Learn more about staying connected with Ameriprise digital tools.](#)

Disclosures:

The secure site is intended for informational purposes only and is not an official report of any of your accounts. Accuracy, completeness and timeliness cannot be guaranteed.

The displayed value of your accounts on the secure site and current market value of your securities may be updated using at least 15-minute delayed quotes for exchange-traded securities during market hours. Market data should be used for informational purposes only and is subject to change.

Account data on screenshots in this document is for illustrative purposes only, does not reflect actual account data and is not a recommendation.

The third party account information shared with your financial advisor through Total View is for informational purposes only. Review or analysis of this information does not constitute an endorsement or recommendation by your financial advisor or Ameriprise of the investments, products or services held or utilized by you and referenced by such third-party account information and does not create a duty to advise you with respect to such third-party assets and services.

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