

Consulting Services Supplement to Ameriprise Financial Planning Service Client Disclosure Brochure
(Form ADV Part 2A) dated March 2024

Update dated March 2024

This is a supplement to information contained in the Brochure and replaces any previous updates. All information contained in the Brochure remains the same with the exception of the language noted below. To help you better understand this information, headings and subheadings in this supplement generally coincide with those in the Brochure. If there is any conflict between the supplement and the Disclosure Brochure, the supplement supersedes the Brochure.

An additional service option, described below, is available from Ameriprise Financial Planning Service on a limited basis only through Brostrom and Berlin Wealth Management.

Page 3 under the heading “Additional financial planning areas”

[Add the following language]

Consulting Service

This service may provide information, analysis and advice in long-term business planning matters. These matters may include:

Business and Entity valuation of:

- > Interests in sole proprietorships, general and limited partnerships, limited liability entities, S corporations and C corporations
- > Employee stock ownership trusts and plans
- > Derivative instruments and/or ownership interests such as stock options and warrants
- > Debt instruments and/or ownership interests such as notes, bonds and/or convertible debt.

These valuations may be used by clients in support of long-term business planning, merger and acquisition transactions, and tax and regulatory filings. However, Ameriprise Financial Services and Brostrom and Berlin Wealth Management do not provide tax or legal advice or filing services. Brostrom and Berlin Wealth Management’s services can provide information related to the general tax treatment of financial services products, the general tax implications of a transaction, or of establishing a certain type of ownership or product. See the **“Income tax planning”** subsection of the **“Additional financial planning areas”** in the Disclosure Brochure.

Executive compensation programs

Analysis and advice that may be used by clients and their legal and tax advisers to develop and implement executive compensation programs, including programs involving the awarding of compensation based on increases in a business entity’s value and/or involving the transfer of ownership interests in a business entity.

Expert witness testimony

May be provided in support of the Business and Entity valuation and/or Executive compensation programs

Page 8, under the heading “Fees and Compensation”

[Add the following language after the last paragraph in the section]

One half of the fee is payable when you select the Consulting Service option and sign the Agreement. The remainder of the fee is due when you receive the analysis and written advice.