



Rise Private Wealth Management

Ameriprise Private Wealth Advisory Practice

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Rise Private Wealth Management
A private wealth advisory practice of
Ameriprise Financial Services, Inc.

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How we can work together

Build a more confident financial future

Fundamental Advice Service

Areas of Focus:

- Financial Fundamentals
- Investments

One of the following planning strategies:

- Tax Planning
- Education
- Retirement
- Basic Estate

Client Service:

- Annual Planning Meeting with Advisor
- Semi-Annual Review (phone call) with Associate Financial Advisor
- Educational events

Assets: \$500,000 - \$1 Mil

Annual Fee for Service: \$2,500-\$3,600

Advanced Advice Service

Areas of Focus:

- Financial Fundamentals
- Investments

Up to two of the following planning strategies:

- Tax Planning
- Education
- Retirement
- Basic Estate
- Business Owner

Client Service:

- Annual Planning Meeting with Advisor
- Semi-Annual Review (phone call) with Associate Financial Advisor
- Educational events
- Premier & Private Dinner events

Assets: \$1 Mil - \$2 Mil

Annual Fee for Service: \$3,600-\$5,000

Premier Advice Service

Areas of Focus:

- Financial Fundamentals
- Investments

Up to three of the following planning strategies:

- Tax Planning
- Education
- Retirement
- Advanced Estate
- Advanced Business Owner

Client Service:

- Annual Planning Meeting with Advisor
- Quarterly investment calls
- Semi-Annual Review (phone call) with Associate Financial Advisor
- Collaborative Meetings with Other Professionals, as needed
- All client events

Assets: \$1 Mil - \$3 Mil

Annual Fee for Service: \$3,600-\$5,000

Elite Advice Service

Areas of Focus:

- Financial Fundamentals
- Investments

Three or more of the following planning strategies:

- Advanced Tax Planning
- Education
- Retirement
- Advanced Estate
- Advanced Business Owner

Client Service:

- Quarterly Meeting with Advisor
- Quarterly investment calls
- Collaborative Meetings with Other Professionals, as needed
- All client events

Assets: \$2 Mil+

Annual Fee for Service: \$7,500-\$10,500