

General Information

Name: Sara J. Carter

CONFIDENTIAL

PID 285944

AGENCY INFORMATION

Organization	Suborganization	Title
Judicial Circuit (3Rd)	Elected Constitutional Officer	County Judge

CANDIDATE FOR

Position	Agency Name	Position sought or held
County Judge	Third Judicial Circuit, Columbia County Judge	Columbia County Judge, Group 1

Net WorthMy Net Worth as of April 1, 2026 was \$ 5,822,000.00.**Assets**

Household goods and personal effects may be reported in a lump sum if their aggregate value exceeds \$1,000. This category includes any of the following, if not held for investment purposes: jewelry; collections of stamps, guns, and numismatic items; art objects; household equipment and furnishings; clothing; other household items; and vehicles for personal use.

The aggregate value of my household goods and personal effect is \$ 125,000.00.

ASSETS INDIVIDUALLY VALUED AT OVER \$1,000:

Description of Asset	Value of Asset
Corebridge Deferred Compensation Account (see attached)	\$ 64,052.89

2025 Form 6 - Full and Public Disclosure of Financial Interests

Filed with COE: 04/20/2026

Description of Asset	Value of Asset
Ameriprise Brokerage Account (see attached)	\$ 163,980.68
Florida Prepaid College Fund ({REDACTED} {REDACTED}) (see attached)	\$ 24,114.66
Florida Prepaid College Fund ({REDACTED}) (see attached)	\$ 23,649.83
VyStar Credit Union Bank Accounts	\$ 467,864.18
Florida Farm Bureau Whole Life Policy - cash surrender value	\$ 9,557.89
VyStar Credit Union Bank Accounts	\$ 37,346.04
{REDACTED}	\$ 760,000.00
{REDACTED}	\$ 170,000.00
Alachua County, FL Parcel ID: {REDACTED}	\$ 15,000.00
{REDACTED}	\$ 380,000.00
Columbia County, FL Parcel {REDACTED}	\$ 20,000.00
Columbia County, FL Parcel {REDACTED}	\$ 150,000.00
Columbia County, FL Parcel {REDACTED}	\$ 15,000.00
Columbia County,{REDACTED}	\$ 15,000.00
Columbia County, FL Parcel {REDACTED}	\$ 15,000.00
Columbia County, FL Parcel {REDACTED}	\$ 75,000.00
2026 Subaru Ascent	\$ 50,000.00
2019 Kubota Tractor with attachments	\$ 45,000.00
2007 John Deere Tractor with attachments	\$ 4,000.00
16 foot utility trailer	\$ 2,000.00
Polaris Ranger	\$ 5,000.00
Polaris Ranger	\$ 8,000.00
Columbia County Parcel {REDACTED}	\$ 12,500.00
Columbia County Parcel {REDACTED}	\$ 30,000.00
Columbia County Parcel {REDACTED}	\$ 565,000.00
Columbia County Parcel {REDACTED}	\$ 157,500.00
Columbia County Parcel {REDACTED}	\$ 395,000.00
Columbia County Parcel {REDACTED}	\$ 162,500.00

2025 Form 6 - Full and Public Disclosure of Financial Interests

Filed with COE: 04/20/2026

Description of Asset	Value of Asset
Columbia County Parcel {REDACTED}	\$ 25,000.00
Columbia County Parcel {REDACTED}	\$ 152,500.00
Columbia County Parcel {REDACTED}	\$ 607,500.00
Columbia County Parcel {REDACTED}	\$ 202,500.00
Columbia County Parcel {REDACTED}	\$ 202,500.00
Columbia County Parcel {REDACTED}	\$ 242,500.00
Columbia County Parcel {REDACTED}	\$ 17,500.00
Columbia County Parcel {REDACTED}	\$ 2,500.00
Columbia County Parcel {REDACTED}	\$ 347,500.00
Columbia County Parcel {REDACTED}	\$ 145,000.00
Columbia County Parcel {REDACTED}	\$ 250,000.00
See Attached	

Liabilities

LIABILITIES IN EXCESS OF \$1,000:

Name of Creditor	Address of Creditor	Amount of Liability
First Federal Bank	707 SW Main Blvd., Lake City, FL 32025	\$ 133,497.35
First Federal Bank	707 SW Main Blvd., Lake City, FL 32025	\$ 100,000.00

JOINT AND SEVERAL LIABILITIES NOT REPORTED ABOVE:

Name of Creditor	Address of Creditor	Amount of Liability
VyStar Credit Union	PO Box 45085, Jacksonville, FL 32232	\$ 62,284.40
First Federal Bank	707 SW Main Blvd., Lake City, FL 32025	\$ 83,262.85

Income

Identify each separate source and amount of income which exceeded \$1,000 during the year, including secondary sources of income. Or attach a complete copy of your 2025 federal income tax return, including all W2s, schedules, and attachments. Please redact any social security or account numbers before attaching your returns, as the law requires these documents be posted to the Commission's website.

☐ I elect to file a copy of my 2025 federal income tax return and all W2s, schedules, and attachments.

PRIMARY SOURCES OF INCOME:

Name of Source of Income Exceeding \$1,000	Address of Source of Income	Amount
Ashley Joyce	24772 NW 187th Ave., High Springs, FL 32643	\$ 14,400.00
Ed Bennett	1371 SE Inglewood Dr., Lake City, FL 32025	\$ 1,750.00
American Towers, LLC	PO Box 2009, Woburn, MA 01801	\$ 9,600.00
Putnal Premium Pinestraw	4987 East US 27, Mayo, FL 32066	\$ 22,033.27
State of Florida (salary)	200 E. Gaines St., Tallahassee, FL 32399	\$ 189,755.04

SECONDARY SOURCES OF INCOME (Major customers, clients, etc. of businesses owned by reporting person):

Name of Business Entity	Name of Major Sources of Business' Income	Address of Source	Principal Business Activity of Source
N/A			

Interests in Specified Businesses**Business Entity # 1**

N/A

Training

Based on the office or position you hold, the certification of training required under Section 112.3142, F.S., is not applicable to you for this form year.

Signature of Reporting Official or Candidate

Under the penalties of perjury, I declare that I have read the foregoing Form 6 and that the facts stated in it are true.

Sara J. Carter

Digitally signed: 04/20/2026

Filed with COE: 04/20/2026

January 1, 2026

SARA J CARTER

PREPAID ACCOUNT STATEMENT

This statement summarizes the financial status of your Prepaid 529 Plan(s) for [REDACTED] as of January 1, 2026.
To manage your online account, please visit myFloridaPrepaid.com.

STUDENT INFORMATION

Student (Beneficiary):

Address:

Primary Phone:

Email:

sarajcarter@hotmail.com

Matriculation Year:

2034

Social Security #:

Received

Residency:

Verified

PREPAID PARTICIPATION & PAYMENT SCHEDULE

PLAN ID	PLAN NAME	PAYMENT DUE	TOTAL DUE	BILLED	REMAINING
	4-Year Florida University	\$0.00	\$23,649.83	\$23,649.83	\$0.00
TOTAL		\$0.00	\$23,649.83	\$23,649.83	\$0.00

PREPAID BENEFIT DETAILS

Prepaid Plans may be made up of several different components - tuition and fees - and coverage will vary by type of plan and year purchased.

UNIT TYPE	DESCRIPTION	PURCHASED	AVAILABLE
Tuition	University Tuition, Financial Aid, & Capital Improvement Fees	120.00000	120.00000
Local	University Activity & Service, Health, & Athletic Fees	120.00000	120.00000
TDF	University Tuition Differential Fees	120.00000	120.00000



PO Box 31088 • Tampa, FL 33631-3088

January 1, 2026

SARA J CARTER

PREPAID ACCOUNT STATEMENT

This statement summarizes the financial status of your Prepaid 529 Plan(s) for [REDACTED] as of January 1, 2026. To manage your online account, please visit MyFloridaPrepaid.com.

STUDENT INFORMATION

Student (Beneficiary):	[REDACTED]	Matriculation Year:	2036
Address:	[REDACTED]	Social Security #:	Received
Primary Phone:	[REDACTED]	Residency:	Verified
Email:	sarajcarter@hotmail.com		

PREPAID PARTICIPATION & PAYMENT SCHEDULE

PLAN ID	PLAN NAME	PAYMENT DUE	TOTAL DUE	BILLED	REMAINING
	4-Year Florida University	\$0.00	\$24,114.66	\$24,114.66	\$0.00
TOTAL		\$0.00	\$24,114.66	\$24,114.66	\$0.00

PREPAID BENEFIT DETAILS

Prepaid Plans may be made up of several different components - tuition and fees - and coverage will vary by type of plan and year purchased.

UNIT TYPE	DESCRIPTION	PURCHASED	AVAILABLE
Tuition	University Tuition, Financial Aid, & Capital Improvement Fees	120.00000	120.00000
Local	University Activity & Service, Health, & Athletic Fees	120.00000	120.00000
TDF	University Tuition Differential Fees	120.00000	120.00000



State of Florida
January 01, 2026 - March 31, 2026

FLORIDA DEFERRED COMPENSATION PLAN

DEFERRED COMPENSATION PLAN
ELECTIVE DEFERRAL

Account Number: _____

CARTER, SARA J

YOUR CURRENT VALUE
\$64,052.89

A Description of Terms is provided at the end of this statement.

This statement may not reflect all fees and expenses for your investments. Your account opening documents, any applicable insurance contracts, and any applicable prospectuses include a description about fees and expenses that you pay for the investments in your account(s). If you are invested in a variable annuity, a description of fees and expenses attributable to your contract and the underlying funds are included in your product and underlying fund prospectuses available at <https://www.corebridgefinancial.com/rs/prospectuses> and reports/annuities

Important Information

Help protect your personal information from fraud and cyber threats by registering your Corebridge account online today. Secure access allows you to check balances, make transactions and manage your account with confidence. Just click "Register" on the homepage of [corebridgefinancial.com/retire](https://www.corebridgefinancial.com/retire) to get started.

Take the next step toward financial confidence with our Financial Wellness Webinar Series. Register for upcoming sessions to learn practical strategies for saving more, managing debt and building a more secure financial future. Visit [corebridgefinancial.com/rs/webinars](https://www.corebridgefinancial.com/rs/webinars) to register or watch webinars on demand.

Value Summary	For the period		Since inception
	Beginning Value	\$62,677.00	
	Your contributions	\$3,320.70	\$50,396.48
	Net change in value	-\$1,944.81	
	Ending Value	\$64,052.89	
	Vested Value	\$64,052.89	

Asset Allocation Summary	Asset class	Ending value	% of total
	Hybrid	\$64,052.89	100%
	Total	\$64,052.89	100%

Visit your financial representative:
LAURA D GOLUBEV
(904) 801-9940

Speak with a Client Service Professional:
7AM to 8PM (CST), Monday - Friday
(800) 448-2542

Click
[corebridgefinancial.com/rs/floridadcp](https://www.corebridgefinancial.com/rs/floridadcp)



State of Florida
January 01, 2026 - March 31, 2026
CARTER, SARA J

Investment Summary

Funds by Asset Class	Beginning value	Additions	Reductions	Net change in value	Ending value	Future contrib
Hybrid						
Amerifunds 2045 Trgt Dt Retr R6	\$62,677.00	\$3,320.70	\$0.00	-\$1,944.81	\$64,052.89	100%
Total Hybrid	\$62,677.00	\$3,320.70	\$0.00	-\$1,944.81	\$64,052.89	100%
Total	\$62,677.00	\$3,320.70	\$0.00	-\$1,944.81	\$64,052.89	100%

Some mutual funds may apply redemption fees to discourage frequent or short-term trading (e.g., buying and selling fund shares within a short period of time). These fees range from 0.5% to 2.0%. The fees are intended to discourage short-term investing and excessive trading. Redemption fees are disclosed in a fund's prospectus and may be shown on a fund's fact sheet. We encourage you to invest for the long term to avoid these fees. For more information on redemption fees, log in to your account at corebridgefinancial.com/retire.

PLEASE BE ADVISED THAT UPDATED PROSPECTUSES, ANNUAL REPORTS AND/OR SEMI-ANNUAL REPORTS FOR THE MUTUAL FUNDS OFFERED UNDER THE PLAN CAN BE OBTAINED BY CALLING 1.800.448.2542 OR BY VISITING COREBRIDGEFINANCIAL.COM/RETIRE.

The Corebridge Fixed Account is a group fixed unallocated annuity (Policy Form GFUA-398 and GFUA-398 (457)) issued by The Variable Annuity Life Insurance Company, Houston, TX. The current interest rate is established on a 'portfolio' basis; with the same rate applicable to all amounts on deposit for the period such current rate is in effect. All interest is credited daily at an annual effective rate. The interest crediting policy and practices are subject to change. Any changes will not reduce the current rate below either the contractually guaranteed minimum or the current annual guaranteed rate, and will not reduce amounts already credited to the account. All guarantees are backed by the claims-paying ability of The Variable Annuity Life Insurance Company, Houston, TX.

Performance Summary

	For the period 01/01/26 - 03/31/26	Year to date 01/01/26 - 03/31/26	For 12 months 03/31/25 - 03/31/26
FLORIDA DEFERRED COMPENSATION PLAN			
DEFERRED COMPENSATION PLAN	-3.02%	-3.02%	16.52%

Personalized rate of return is a measure of the performance of the investments that you hold in your retirement plan account. It indicates the return on investments over a period of time and factors in the activities that affect your account including 1) performance of investments, 2) contributions and 3) withdrawals and loans.

Remember past performance does not guarantee future results.

Performance information for each fund is available online at corebridgefinancial.com/retire.

FLORIDA DEFERRED COMPENSATION PLAN

You can choose to receive e-mail notifications when your account statements, certain regulatory documents and transaction confirmations become available online with eDelivery. Save paper, time and energy. It's easy to sign-up. Just visit floridadcp.corebridgefinancial.com today to get started.

EMPLOYER ACCOUNT

FLORIDA DEFERRED COMPENSATION PLAN
DEFERRED COMPENSATION PLAN
ELECTIVE DEFERRAL

Beneficiary Summary

Name	Designation	Percent
	Primary	100%
	Contingent	50%
	Contingent	50%
section continues >		

Visit your financial representative:
LAURA D GOLUBEV
(904) 801-9940

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Click
corebridgefinancial.com/rs/floridadcp



State of Florida
January 01, 2026 - March 31, 2026
CARTER, SARA J

Beneficiary Summary, continued

Name	Designation	Percent
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Beneficiary designations may be subject to regulatory guidelines in some employer plans.

The beneficiaries listed above represent the information currently on file with Corebridge Financial. Visit us at corebridgefinancial.com/retire to update your beneficiary information online or request the form if required by your employer.

Transactions by Account See the end of the statement for term definitions

GROUP MUTUAL FUND W/ FIXED ANNUITY (M404) GFUA-398

Effective date	Description	Amount	Investment	Number of Units/Shares	Unit/Share Price
	Beginning value 01/01/26	\$62,677.00	Amerfunds 2045 Trgt Dt Retr R6	2,603.946962	\$24.070000
01/06/26	Administration fee	-\$17.24	Amerfunds 2045 Trgt Dt Retr R6	-0.699959	\$24.630000
01/30/26	Contribution 01/30/26	\$1,106.90	Amerfunds 2045 Trgt Dt Retr R6	44.777508	\$24.720000
02/27/26	Contribution 02/27/26	\$1,106.90	Amerfunds 2045 Trgt Dt Retr R6	44.276000	\$25.000000
03/31/26	Contribution 03/31/26	\$1,106.90	Amerfunds 2045 Trgt Dt Retr R6	47.343884	\$23.380000
03/31/26	Investment gains/losses	-\$1,927.57	Amerfunds 2045 Trgt Dt Retr R6		
	Ending value 03/31/26	\$64,052.89	Amerfunds 2045 Trgt Dt Retr R6	2,739.644395	\$23.380000

The interest rate for assets on deposit in the Fixed Account is 3.24%. This rate is subject to change during the year. Additional interest rate information is available upon request.

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State of Florida
January 01, 2026 - March 31, 2026
CARTER, SARA J

► Important Information

VALIC Retirement Services Company (VRSCO) provides prospectuses and related financial reports for the mutual funds available in your plans electronically. To view or print a prospectus or related financial reports, visit corebridgefinancial.com/retire and click on ePrint under Quick Links. Enter the account number in the Login field and click go. Click on "Funds" in Quick Links and funds available in this plan are displayed.

Please review this account statement in its entirety and notify us immediately if you find any errors or omissions. To the extent that you believe there are errors or omissions, you should provide notice to us in writing to protect your rights. If you contact us by telephone concerning an error or omission, you should re-confirm the conversation in writing to protect your rights. After 30 days from the date of the statement, it will be deemed correct.

Net Change in Value reflects realized transactions and unrealized gains and losses on investments and any administrative charges imposed on the plan. Fees and charges imposed by each mutual fund are described in each fund's prospectus. For further information about these charges, call us to speak with a Client Service Professional.

To help achieve long-term retirement security, you should give careful consideration to the benefits of a well-balanced and diversified investment portfolio. If you invest more than 20% of your retirement savings in any one company stock or industry sector, your savings may not be properly diversified. Spreading your assets among different types of investments can help reduce the potential risk of your overall portfolio in changing market or economic conditions that may cause one category of assets or particular security to perform very well while causing another category of assets or security to perform poorly. Diversification does not ensure a profit or protect against market loss. However, it is an effective strategy to help you manage investment risk. For further assistance you may visit the Department of Labor website at www.dol.gov/agencies/ebsa/laws-and-regulations/laws/pension-protection-act/investing-and-diversification.

Annuities are issued by The Variable Annuity Life Insurance Company (VALIC), Houston, TX or The United States Life Insurance Company in the City of New York (USL), New York, NY. Guarantees are backed by the claims-paying ability of the issuing insurance company, and each company is responsible for the financial obligations of its products. Beginning January 1, 2026, USL will be Corebridge Financial's sole authorized issuer of new annuities in New York.

Variable annuities are distributed by Corebridge Capital Services, Inc., member FINRA. Securities and investment advisory services offered through VALIC Financial Advisors, Inc., member FINRA, SIPC and an SEC-registered investment adviser. VALIC Retirement Services Company (VRSCO) provides retirement plan recordkeeping and related services and is the transfer agent for certain affiliated variable investment options. VALIC Trust Company Inc. provides plan trust and custodial services.

All companies above are wholly owned subsidiaries of Corebridge Financial, Inc. Corebridge Retirement Services, Corebridge Financial and Corebridge are marketing names used by these companies. Learn more about our affiliated companies: corebridgefinancial.com/names.

An owner or beneficiary of an annuity contract or certificate may contact the annuity contract issuer at 1.800.448.2542 to obtain a quote for purchase rates and additional information related to annuity income or payout options.

VRSCO provides prospectuses and related financial reports for the mutual funds available in your plans electronically. To view or print a prospectus or related financial reports, visit corebridgefinancial.com/retire and click on ePrint under Quick Links. Enter the account number in the Login field and click go. Click on "Funds" in Quick Links and funds available in this plan are displayed.

VALIC Financial Advisors, Inc., a Corebridge subsidiary, receives 12b-1 fees from several mutual funds for service, marketing and distribution and may also receive recordkeeping fees from fund families. These fees are not used to pay financial professionals either as compensation or incentives for recommending certain funds. These fees may offset your plan administration costs or other fees. For more information about Corebridge Retirement Services' revenue-sharing policy, please visit corebridgefinancial.com/rs/policies/revenue-sharing. Additional information regarding payments that have been or will be received by Corebridge subsidiaries (VALIC, USL, and their affiliates) may also be found in the applicable fund prospectuses and/or statement of additional information of the variable contract prospectus.

State of Florida
January 01, 2026 - March 31, 2026
CARTER, SARA J

► Description of Terms

This is not a complete list of all provisions/terms, conditions, limitations, charges and expenses. Please refer to your account opening documents, applicable contracts and prospectus(es) for complete information. In the event of a conflict, the terms of your contract or prospectus will govern.

Additions represent the dollar value of all financial transactions that purchased Units/Shares during the reporting period.

Asset Allocation Summary is a graphic illustration depicting the allocation of your fund selections by asset class at the end of the reporting period of your statement.

Asset Class is a grouping of investments/funds that exhibit similar investment objectives and/or strategies.

Beginning Value represents the dollar value at the beginning of the reporting period of your statement.

Ending Value represents the dollar value at the end of the reporting period of your statement. Your Ending Value does not include any applicable fees and expenses if you liquidate your account.

Investment Summary shows the dollar values for each fund by asset class that were in effect at any time during the reporting period. For each fund the Beginning Value, Additions, Reductions, Net Change in Value and Ending Value are shown.

Net Change in Value reflects credited interest, unrealized gains and losses as well as, to the extent applicable, fees and expenses and other administrative charges imposed on

the plan. This does not include expenses charged by the funds or separate account (if applicable).

Number of Units/Shares shown in the Transaction by Account section of your statement represent the number of units/shares per fund that you owned at the beginning and end of the statement period and the number of units/shares purchased or sold for each financial transaction that occurred during the reporting period.

Reductions represent the dollar value of all financial transactions that sold Units/Shares during the reporting period.

Separate Account Charge is a daily charge for mortality and expense risks, including any applicable benefit riders associated with an investment/fund in a variable annuity.

Share Price is the dollar value of each share in a fund and depends on the investment performance of the fund.

Surrender Value if applicable, is the dollar amount you would receive if you redeemed or surrendered your account on the as-of date noted next to the Surrender Value.

Unit Price is the dollar value of each unit in a variable annuity investment option. The Unit Price depends on the investment performance of the underlying fund, minus the daily Separate Account Charge and other expenses.

Value Summary shows the financial activity for the period being reported that affected the Ending Value.



Your Ameriprise statement

for March 1, 2026 to March 31, 2026

PREPARED FOR SARA J CARTER

Value of your investment accounts

	This month	This year
Beginning value	\$178,971.08	\$158,628.55
Net deposits & withdrawals	\$0.00	\$0.00
Dividends, interest & income	\$0.48	\$23.03
Change in value	-\$12,380.07	\$7,939.91
Ending value	\$166,591.49	\$166,591.49

Your asset allocation



Asset class	Value on Mar 31, 2026	Percent of assets
● Cash & Cash Investments*	\$22,822.46	13.7%
● Equities	\$137,740.23	82.7%
● Alternatives	\$5,835.37	3.5%
● Other assets	\$193.43	0.1%
Total assets	\$166,591.49	100%

*Cash investments includes cash held inside pooled investments (e.g. mutual funds), as part of a manager's investment strategy, and is not directly accessible unless you sell some of that investment. For details visit ameriprise.com/allocation.

Your personal advising team

Gratium Wealth Planning

A private wealth advisory practice of Ameriprise Financial Services, LLC

Matthew Deckman CRPC™ CMFC™

10 Florida Park Drive N Ste D

Palm Coast, FL 32137-3667

386.597.2994

Matthew.J.Deckman@ampf.com

www.ameripriseadvisors.com/team/gratium-wealth-planning

Value of your investment accounts over time



This chart provides a five-year view of your account values. The black line shows the value of your accounts, while the gray line shows your net contributions (deposits less withdrawals).

Get all the details online at ameriprise.com. Click the Portfolio tab to find your latest account value, activity and asset allocation. Your Ameriprise financial advisor can help you understand how the stated account value shown here may differ from the amount you'd receive if you sold your assets (after any tax withholding, outstanding loans, pending transactions and potential fees).

Your security comes first

Keep your information safe with text alerts notifying you of any account changes or activity. Log in to the secure site on ameriprise.com, click Profile, then Alerts to enroll.

Important information to note

One or more documents are intended to accompany this statement, including regulatory notices or disclosures. You can view an electronic version of each document by clicking the following document title(s):

408 b-2 Fee Disclosure Guide

The 408(b)(2) fee disclosure guide (the Guide) for Retirement Plan clients holding accounts at Ameriprise is available online at ameriprise.com/408b2-disclosures. If you need additional information related to this regulation or your responsibilities under it, please visit the Department of Labor's website at dol.gov/agencies/ebsa.

Important disclosure update for Signature Wealth Accounts

Updates to the ADV Disclosure Brochure for the Signature Wealth Investment Manager are available. Refer to the document for more detail.

SARA J CARTER CLIENT 

Plan contribution and distribution summary

Are you maximizing your retirement savings? Different types of retirement accounts have different contribution limits. For tax year 2025 you may qualify to contribute up to \$7,000 to a Traditional or Roth IRA and the limit increases to \$7,500 for 2026. If you're age 50 or older, you can contribute an additional \$1,000 for tax year 2025 and the limit increases to \$1,100 for tax year 2026. You can generally make 2025 contributions through April 15, 2026. Learn more at ameriprise.com/contributions.

Plan name	Plan ID	Tax year 2025 contributions	Tax year 2026 contributions	Tax year 2026 distributions
Retirement Plans				
SARA J CARTER IRA PLAN		\$0.00	\$0.00	\$0.00
Total retirement plan		\$0.00	\$0.00	\$0.00

Ameriprise Brokerage Account

AMERIPRISE TRUST COMPANY | C/O SARA J CARTER | AS CUSTD FOR THE SARA J CARTER IRA

Investment time frame: 11+ years; Risk tolerance: Aggressive; Investment objective: Growth; Liquidity needs: Information still needed
See the Disclosures at the end of your statement for definitions of these suitability terms.

Account #:
 Plan ID:

Value of your account

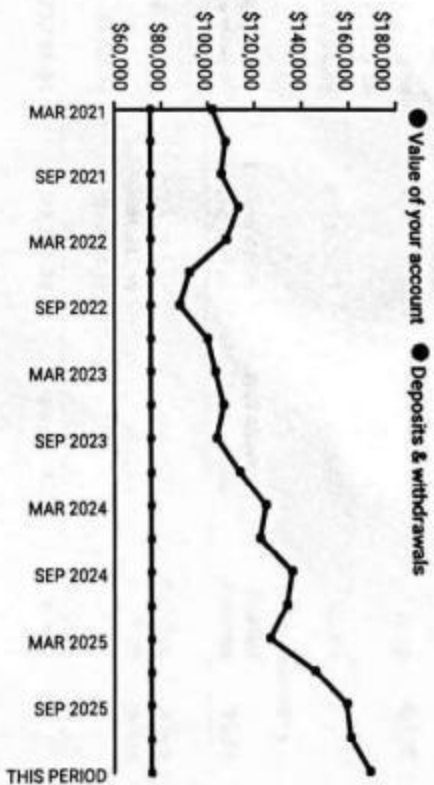
	This period	This year
Beginning value	\$178,971.08	\$158,628.55
Income		
Interest	\$0.48	\$1.23
Other income	\$0.00	\$21.80
Total income	\$0.48	\$23.03
Change in value	-\$12,380.07	\$7,939.91
Ending value	\$166,591.49	\$166,591.49

The Beginning value - This year amount is the fair market value (FMV) of your account at the end of the previous year. This amount will be updated if we are notified of valuation updates by the issuers of any of the investments within this account.
If your financial or tax professional uses your December 31 value to aid in certain calculations, please share this information with them. For example, certain clients may need to use the year-end value when calculating their required minimum distributions.
Important information for IRA Clients: If you are an IRA client, the interest and dividends described on this statement may not be taxable to you. In general, distributions from your IRA will be taxed as ordinary income for the year in which the distribution occurs.

Summary of your holdings

Asset	Value of assets	Percent of account
Cash and equivalents	\$18,928.29	11.4%
Mutual funds	\$71,125.69	42.7%
Unit investment trusts	\$76,537.51	45.9%
Ending value	\$166,591.49	100.0%

Value of your account over time



Ameriprise Brokerage Account (continued)

Account #:

Your holdings

Description	Ending value this period ⁷	Ending value last period	Net change this period	Estimated Annual income	Yield
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Cash and equivalents

Ameriprise Insured Money Market (A1MMA)²

Ameriprise Bank FSB Minneapolis MN

Total Cash and equivalents⁵

	\$18,928.29			\$5.49	0.03%
	\$18,928.29				
	\$18,928.29	\$19,002.81	-\$74.52	\$5.49	

Description	Symbol CUSIP	Quantity	X Market price	Ending value = this period ⁷	Ending value last period	Net change this period	Estimated Annual income	Yield
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Mutual funds

FIRST EAGLE GLOBAL CL A	S6ENX	648.044	\$81.86	\$53,048.88	\$57,915.69	-\$4,866.81	\$1,772.40	3.34%
VIRTUS KAR MID CAP GROWTH CL A	PHSKX	249.107	\$33.74	\$8,404.87	\$9,241.86	-\$836.99	\$0.00	0.00%
VIRTUS DUFF&PHELPS GLOBAL REAL ESTATE SECURITIES CL A	V6SAX	264.550	\$36.56	\$9,671.94	\$10,558.19	-\$886.25	\$218.75	2.26%

Total Mutual funds

	\$71,125.69	\$77,715.74	-\$6,590.05	\$1,991.15	
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Unit investment trusts

FIRST TRUST U S INFRASTRUCTURE 38 SA RE	38338L335	4,575.560	\$12.94	\$59,209.11	\$63,499.15	-\$4,290.05	\$150.99	0.26%
FIRST TRUST INTL HIGH DIV EQTY 58 MO RE	38342Y315	1,651.000	\$10.50	\$17,328.40	\$18,753.37	-\$1,424.97	\$559.85	3.23%

Total Unit investment trusts

	\$76,537.51	\$82,252.53	-\$5,715.02	\$710.84	
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Total account holdings

	\$166,591.49	\$178,971.03	-\$12,379.59	\$2,707.48	
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² Ameriprise Insured Money Market Account (A1MMA) is a money settlement option made available by Ameriprise Financial where cash is swept to omnibus account(s) at one or more FDIC member banks (the Program Banks) including our affiliate, Ameriprise Bank, FSB. Deposits at Program Banks receive FDIC pass-through insurance coverage up to applicable limits and are not covered by SIPC. Certain conditions must be satisfied for pass-through FDIC coverage to apply. You may opt out of depositing your funds at listed Program Banks as outlined by calling 800-863-7919 or through your financial advisor.

⁵ Any balances held in A1MMA, ABISA or a money market mutual fund serving as your sweep account can be liquidated at your request and the proceeds held as cash in the account or remitted to you per your instructions. Annual percentage yield earned and interest paid during the statement period are shown in your account activity.

⁷ Ending value amounts for Your holdings represent information posted as of trade date and thus may include transactions that have not settled as of the date of this statement. Total Value is derived from both assets held by the firm in your account, as well as assets held away which is reported for convenience purposes.

See the Disclosures section of this statement for more information.

Ameriprise Brokerage Account (continued)

Account #:

Your account activity

Date	Transaction	Description	Symbol/ CUSIP	Quantity	Price	Amount
Income						
03/31/2026	INTEREST	AMERIPRISE INSURED MONEYMARKET ACCOUNT 033126 APYE .03%		18,928		\$0.48
Fees						
03/23/2026	FEE	CUSTODIAL FEE 2026				-\$0.48
Other activity						
03/31/2026	INTEREST REINVEST	AMERIPRISE INSURED MONEY MARKET ACCOUNT				-\$0.48

An investment in money market funds is not insured or guaranteed by the Federal Deposit Insurance Corporation or any other government agency. Although the Fund seeks to maintain the value of your investment at \$1.00 per share, it is possible to lose money by investing in the Fund.

Your cash sweep activity

Date	Transaction	Description	Amount
03/23/2026	SALE	AMERIPRISE INSURED MONEY MARKET ACCOUNT	\$75.00

Additional information about your account

In the next quarter, we expect to launch the following bank in the Ameriprise Insured Money Market Account (AIMMA) sweep program: Truist Bank. If you participate in the AIMMA sweep program, please refer to the current AIMMA Bank Lists at ameriprise.com/sweepstakes for a list of banks currently in the program as well the date this new bank will first become available to take deposits

Additional important disclosures

Throughout these disclosures, Ameriprise Financial Services, LLC, the introducing firm, and American Enterprise Investment Services, Inc., the clearing firm, are abbreviated as AFS and AEIS respectively. Affiliates RiverSource Life Insurance Co. and RiverSource Life Insurance Co. of New York are abbreviated as RVS. **Agreements and disclosures:** You may access current versions of documents including agreements, disclosures and fee documentation governing brokerage and managed accounts on our website at ameriprise.com/disclosures.

Check deposits: Checks that should be made payable to AEIS include Ameriprise Brokerage, ONE Financial, Managed Accounts, 529 Plans and Variable Annuities. Checks that should be made payable to AFS include RiverSource Insurance and Annuities, Ameriprise Certificates, Financial Plans and checks for multiple products that do not include funds to be sent to Brokerage or a Managed Account. Checks for deposit to an Ameriprise Bank Account should be made payable to the account owner/client or Ameriprise Bank. Checks for deposit into RiverSource Life of New York accounts should be made payable to RiverSource Life of New York. Checks for RAVA 5 accounts that are transfer checks or additional payments should be made out to RiverSource Life Insurance Company. No checks or payments should be made payable to any advisor or their practice as these are not an affiliate or subsidiary of the firm.

AEIS balance sheet available online for Dec. 31, 2025: In accordance with requirements under Securities and Exchange Commission ("SEC") Rule 17a-5, we make our Statement of Financial Condition available on our website at <http://ameriprise.com/aeisfinancialstatement>. You may also obtain a free copy by mail by calling us at 800.297.7378.

American Enterprise Investment Services, Inc. (AEIS or the Company), a wholly owned subsidiary of Ameriprise Financial, Inc., is the registered clearing broker dealer for your securities positions and free credit balances held in your Ameriprise brokerage account(s). Under the SEC's Uniform Net Capital Rule, Rule 15c3-1, AEIS is required to provide this information to its customers and is required to maintain net capital of 2% in excess of aggregate debit items arising from client transactions. On December 31, 2025, the Company's net capital was \$172,937,384 or 9.85% of aggregate debit items and \$137,821,066 in excess of its required net capital of \$35,116,318.

Third Party Payments and Cost Reimbursement Services: AEIS performs certain services such as record keeping, administration and shareholder servicing support, applicable platform level eligibility and investment product due diligence, investment research, training and education, client telephonic and other servicing, and other support related functions, such as trading systems, asset allocation and performance reporting tools, and websites and mobile applications (collectively, "Cost Reimbursement Services"). AEIS receives a variety of these payments for Cost Reimbursement Services ("Cost Reimbursement Payments") from investment products sponsored or managed by affiliated investment advisers (e.g., Columbia Management Investment Advisers) and from unaffiliated product companies for investments you make as a result of our recommendations. Cost Reimbursement Payments are received at a higher percentage rate from certain mutual fund firms (described below as "Full Participation Firms"), which may create a conflict of interest or incentive if AFS promotes, or Ameriprise Financial advisors recommend, the mutual funds offered by a Full Participation Firm. These payments form a structure referred to as the Ameriprise Financial Mutual Fund Program. Cost Reimbursement Payments are not shared with your financial advisor. Cost Reimbursement Payments for marketing and sales support are also applicable to other investment product categories, such as annuities, insurance, UITs, actively managed ETFs, structured products and alternative investments, such as non-traded REITs/BDCs, hedge fund offerings, managed futures funds, private equity offerings, and real estate private placements. For additional information regarding the compensation amounts and practices of a particular mutual fund firm, please review all pertinent sales literature, statements of additional information prospectuses, accounts agreements, policies, contracts, other offering documents, and the Other Important Brokerage Disclosures document on ameriprise.com/disclosures.

Financial interest in products: AFS and its affiliates have a greater financial interest in the sales of products that they manufacture, AFS and its affiliates receive more revenue from the sale of some financial products and services, particularly those products and services sold under the Ameriprise, Columbia Threadneedle Investments and RVS brands, than for the sale of other products and services.

Suitability terms: investment time frame is the expected period of time you plan to invest to achieve your current financial goal(s). Choices are: less than 1 year, 1-3 years, 4-7 years, 8-10 years and 11+ years. Risk tolerance describes your ability to bear the potential of your account losing value in exchange for the potential of higher returns. The higher your risk tolerance, the potential for substantial losses and gains increases. Choices are: Conservative, Moderately conservative, Moderate, Moderately aggressive, and Aggressive.

Investment objective identifies your intent or planned purpose for the investment dollars in your account. Choices are: Growth, Growth with income, Income, Capital preservation, Speculation, Tax considerations, Education, Estate planning, and Protection. **Liquidity needs** is the period of time from the present until you anticipate needing access to your investment dollars.

In case of errors or questions about your electronic transfers: Call us at 800.862.7919 or write us at Ameriprise Financial, 70100 Ameriprise Financial Center, Minneapolis, MN 55474, promptly if you think your statement or receipt is wrong or if you need more information about a transfer on the statement or receipt. We must hear from you no later than 60 days after we sent you the FIRST statement on which the error or problem appeared.

(1) Tell us: your name and account number (if any).
(2) Describe the error or the transfer you are unsure about, and explain as clearly as you can why you believe it is an error or why you need more information.
(3) Tell us the dollar amount of the suspected error.

We will investigate your complaint and will correct any error promptly. If we take more than 10 business days (or 20 business days for new accounts) to do this, we will credit your account for the amount you think is in error, so that you will have the use of the money during the time it takes us to complete our investigation. If we ask you to put your complaint or question in writing and we do not receive it within 10 business days, we may not credit your account. We may take up to 45 days to complete our investigation (90 days for transfers involving new accounts, point-of-sale, or foreign-initiated transactions). We will tell you the results within three business days after completing our investigation. If we determine that there was no error, we will send you a written explanation. You may ask for copies of the documents that we used in our investigation.

Valuation of alternative investments: Interests in limited partnerships, hedge fund offerings, non-traded real estate investment trusts, non-traded business development companies, non-traded closed-end funds, real estate private placements, tenant-in-common real estate securities, managed futures funds, private equity offerings or other alternative investments (collectively referred to as Alternative Investments), which are not listed in a national exchange, are generally illiquid because no formal trading market exists for these securities. Their values may be different from the purchase price and may not necessarily be realized if the issuer liquidates the security or if you sell your interests. If accurate pricing is not available, the value of the position will be reflected as "Not Priced". The valuation of interests in Alternative Investments is either the initial offering price or an estimated value, both of which have been provided by the issuer. Other than the initial offering price, the values of the positions you hold represent estimates of your interest in the net assets of the program and are reflected in the total value of your account, shown herein. In limited circumstances, generally where the position has been purchased at another financial institution, the valuation may be provided by an independent third party pricing agent. Each issuer of an Alternative Investment or third party may have a different method of valuation, and may apply various methods of valuation throughout the life of the investment. Generally, the factors considered include, but are not limited to: actual or estimated property or securities values, capitalization rates, acquisition costs, current and/or future cash flows, the use of cash versus accrual accounting, activity in an informal secondary market or overall performance. For publicly registered companies, the valuation methodology is described in the issuer's annual report and other current periodic reports, which are available to clients. For unregistered products/private placements, contact the managing general partner or company for further information about valuation. The number of units owned has been provided by the management of each program and may not necessarily reflect activity after the initial purchase.

Non-traded real estate investment trust Distribution Reinvestment Plan (DRIP) customers: If you participate in the DRIP and you experience a material adverse change in your financial condition, promptly notify your financial advisor to discuss continued participation in the DRIP.

Callable securities: When we hold securities which are callable in part on your behalf, you will participate in the impartial lottery allocation system for the called securities in accordance with the provisions of the exchange on which they trade, and in compliance with industry rules. For further details about the allocation process please go to www.ameriprise.com/content/files/AMF_CALLABLE_SECURITIES.PDF

"Covered" securities: A security is considered "covered" and subject to special basis and holding period tax reporting rules under these conditions: 1) Stock, including real estate investment trusts (REITs) acquired on or after Jan. 1, 2011, and not purchased under a dividend reinvestment program 2) Mutual funds and REITs/stocks in a dividend reinvestment program purchased on or after Jan. 1, 2012 (except money market funds) 3) Certain options and debt securities with less complex tax treatment purchased on or after Jan. 1, 2014, and 4) Certain options and debt securities with more complex tax treatment purchased on or after Jan. 1, 2016. Some securities are not "covered" by definition, see below. When a "covered" investment is sold, we will report the cost basis and holding period of the investment to you and the IRS (in addition to the already required proceeds information). The cost basis information provided on this statement may not be used for tax reporting purposes. For tax reporting purposes, use the information provided on Form 1099-B, Proceeds from Broker and Barter Exchange Transactions, which will be sent early in the year following the tax year in which the investment was sold.

"Noncovered" securities: "Noncovered" is a term for those securities that are not subject to the required cost basis and holding period reporting described above. Ameriprise Financial provides cost basis and holding period information to clients, but not the IRS, for many "noncovered" securities including "noncovered" equities, mutual funds, exchange-traded funds (ETFs), exchange-traded notes (ETNs), business development corporations (BDCs), unit investment trusts (UITs), real estate investment trusts (REITs), debt instruments, and options acquired before the effective dates listed above. Certain other securities are currently excluded from the cost basis reporting rules, including money market funds, short-term debt instruments, real estate mortgage investments conduits (REMICs) and other mortgage-backed securities, partnerships, trusts, and prepaid forward contracts (including certain structured products). The cost basis information provided for "noncovered" securities may not include changes due to corporate actions (such as mergers, spin-offs, stock dividends or cash dividends in lieu of fractional shares), wash sales, certain mutual fund adjustments, returns of capital, certain adjustments to fixed income securities (including early prepayment of principal, premium amortization, accrual of market discount or original issue discount), or transfers of existing positions into Ameriprise by new or existing clients. Ameriprise is not responsible for "noncovered" cost basis information, and will not verify cost basis information that is provided by someone else (including a client, an advisor or another entity, such as a broker) or is the result of a transfer between persons (including inheritance, gift, divorce, distributions from a trust, shares used to repay a loan, etc.). It also will not verify "noncovered" cost basis information obtained through corporate acquisitions by Ameriprise. For transactions related to any of these activities for "noncovered" shares, review your records and consult your tax advisor when preparing your tax return.

Free credit balance: In general, a free credit balance represents cash held in your brokerage or managed account that is payable upon your demand. We are not required to segregate or hold the funds separately. We may commingle your funds with our general funds or use the funds for our business. We may, but are not obligated to, pay you interest on any available free credit balances, and we may earn income from the balances as compensation for servicing your account. For additional information review Other Important Brokerage Disclosures on ameriprise.com/disclosures.

Order Routing Policy and compensation for order handling: Some market centers or broker-dealers may execute orders at prices superior to the publicly quoted market. AEIS considers a number of factors in its decision process as to the exchange and market centers to which it directs its customer orders for execution. These factors include but are not limited to: the speed of execution, the opportunity for price improvement, liquidity enhancement opportunities, trading characteristics of the particular individual security, and size of the order. AEIS currently does not receive payment for directing orders; however, AEIS reserves the right to receive remuneration if any, received by AEIS will be furnished upon written request. Payment for order flow is not a factor considered when routing orders. For more detailed information, please visit our Order Routing Report published quarterly on ameriprise.com. Please contact us at 800.862.7919 to obtain a printed copy of our

Order Routing Report at no cost, or for further details regarding the routing of any specific order. The link to the SEC 606 Order Routing Report can be found at ameriprise.com/606.

Brokerage mutual fund purchases: When you purchase certain mutual funds at NAV, on selling your shares, you may pay a sales charge. For the charge and other fees, see the prospectus.

Equity Dividend Reinvestment Program (DRIP) customers: Transactions to purchase shares for the DRIP program, where offered, are executed on a riskless principal basis by AEIS. Details of your DRIP transactions are available on written request to AEIS.

Fractional Shares and Liquidation Process: Where your statement indicates a transaction that involved less than one full share of an equity, ETF, preferred or closed-end fund, as well as UITs ("Fractional Share"), AFS and AEIS sold and liquidated the Fractional Share(s) as a client-directed principal transaction on your behalf in accordance with the Ameriprise Brokerage Client Agreement and, if you have a Managed Account, per the liquidation process outlined in your Custom Advisor Relationship Agreement or the applicable Managed Account Client Agreement.

Assets held outside your brokerage account: Certain assets purchased through AFS are displayed on this statement as a courtesy to you, even though the assets are held at a third party, and not custodied in your brokerage account. These products may include but are not limited to annuities and insurance products, hedge fund offerings, private equity offerings, managed futures funds, exchange funds, real estate private placements, DST/ITCs, and certain 529 plans. Ownership records for these products, valuation information, and SIPC coverage, if applicable, are the responsibility of the company holding the assets, and not AFS or AEIS.

The Value of your accounts over time on the first page of your statement reports the following information:

- 1) The ending value of your portfolio for applicable dates going back (up to) five years. The gray line shows the net value of your deposits and withdrawals, falling back (up to) five years. Note:
 - The gray line does not reflect additions or surrenders for third-party annuities linked to your brokerage account prior to Jan. 1, 2017.
 - The gray line does not reflect additions or surrenders from any whole life insurance policies.
- If your portfolio was established on Dec. 31, 2012 or earlier, the gray line starting point was your portfolio value on Jan. 1, 2013. The gray line shows your portfolio value on Jan. 1, 2013 PLUS additions since that time MINUS withdrawals since that time.

Activity for this period: transaction(s) that have not yet settled by the date of this statement will appear on your next statement.

Disclosure for persons without a financial advisor: Mutual funds can be purchased through AFS. For direct purchases AFS will retain all sales charges and 12b-1 fees.

Withholding: The distributions you receive from your annuity, life insurance, or tax-qualified account are subject to federal income tax withholding on the reported taxable portion unless you elect not to have withholding applied (though mandatory withholding may apply in certain situations). If you elect not to have federal withholding, you may make an election not to withhold at the time of your distribution request or, alternatively, you can provide a withholding certificate by contacting us or your financial advisor. Withholding certificates can also be used to elect to have amounts withheld. If you provide a withholding certificate, the withholding election applies prospectively only and remains in effect until you choose to revoke it or change it (e.g., if you want a lesser amount withheld) by providing a new withholding certificate. Note, if you do not make a withholding election, tax will be withheld in accordance with IRS rules (generally, 1% withholding for non-periodic distributions from IRAs and non-qualified annuities and wage-able withholding rules for periodic distributions from either). If total withholding is not adequate, you may need to make estimated tax payments and/or be subject to tax penalties. For tax-qualified accounts withholding will be taken from the gross amount of the distribution, even though it may contain amounts not includible in income and result in excess withholding. State income tax withholding may be required from your distribution. Your state of residence will determine your state income tax withholding requirements, if any. Withholding rules vary by state and in some states withholding is not available. Based on your state's rules you may have the option to: (i) elect out of withholding, (ii) elect to have state withholding apply, or (iii) increase the rate of withholding. For some states, you may need to supply us with a state-specific, or other, form depending on the circumstances. Please see your tax advisor for assistance with these matters.

Third-party issuer assessment: AFS periodically assesses, but does not continuously monitor, the creditworthiness or financial solvency of third-party issuers. You should be advised that credit markets can be volatile, and the creditworthiness of an issuer may change rapidly. AFS, as a holder of these products, does not

guarantee or provide any assurance that a third-party issuer of financial products will be able to fulfill the issuer's obligation to any purchaser of such a product.

Messages for you

Tip to help prevent tax identity theft
Fraudulent activity rises dramatically during tax season. And with the continued increase of electronic filing, it's important to watch out for one type of fraud in particular: tax identity theft. Tax identity theft is a scam in which bad actors steal tax information and use it to file fraudulent returns in their name in hopes of pocketing refunds. Visit ameriprise.com/privacy-security/fraud/fraud-reporting/tax-identity-theft-checklist for a list of ways to help protect yourself from bad actors.



Ameriprise Financial Services, LLC
70100 Ameriprise Financial Center | Minneapolis, MN 55474

SARA J CARTER

Important disclosures

Please review your statement carefully. Report any inaccuracies or discrepancies immediately to the appropriate legal entity outlined below. Any oral communication should be re-confirmed in writing to us to protect your rights, including your rights under the Securities Investor Protection Act. Please notify us promptly in writing of any change of address. In addition, should any material change occur in your investment objectives or financial situation, we request prompt notification to ensure we maintain the most up-to-date background and financial information.

These entities are wholly owned subsidiaries of Ameriprise Financial, Inc. All may be contacted at 800.862.7919 unless otherwise noted below.

American Enterprise Investment Services, Inc. (AEIS), the clearing broker-dealer, member FINRA and SIPC, is responsible for the summary pages and each statement for brokerage or managed account products, including securities positions and free credit balances. Direct inquiries to 70400 Ameriprise Financial Center, Minneapolis, MN 55474. A financial statement for this organization is available for your personal inspection at its offices, or a copy of it will be mailed upon your written request.

Ameriprise Financial Services, LLC (AFS), the introducing broker-dealer, member FINRA and SIPC is responsible for Financial Planning Service product pages. Brokerage accounts, investment, and financial advisory services are introduced by and made available through AFS. Direct inquiries (including a problem with, or a complaint about your financial advisor, or unauthorized activity in your account(s)) to 70100 Ameriprise Financial Center, Minneapolis, MN 55474-0507.

Ameriprise Trust Company (ATC) is a passive custodian for tax qualified accounts including IRAs. ATC outsources all custody of IRA assets to the other regulated custodians.

Ameriprise Bank, FSB (Bank), FDIC-insured, provides banking products including deposit and lending accounts, and personal trust services. Investment products are not insured by the FDIC, NCUA or any federal agency, 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.

Ameriprise Certificate Company, the certificate product issuer, is responsible for Ameriprise Certificate Products and those products are distributed and serviced by AFS.

RiverSource Life Insurance Company and RiverSource Life Insurance Co. of New York (collectively RVS) are responsible for RiverSource insurance and annuity products. Direct inquiries to RiverSource Life Insurance Co. of NY to 800.541.2251.

Municipal securities: AEIS and AFS are registered with the U.S. Securities and Exchange Commission and the Municipal Securities Rulemaking Board (MSRB). The MSRB makes available at its website, www.msrb.org, an investor brochure, which describes the protections that may be provided by the MSRB, and how to file a complaint regarding municipal securities with the appropriate regulatory authority.

Not a Bank: AEIS, AFS, ATC, Ameriprise Certificate Company and RVS are not banks. Investment products are not insured by the FDIC, NCUA or any federal agency, are not deposits or obligations of, or guaranteed by any financial institution, and involve investment risks including possible loss of principal and fluctuations in value.

This document was delivered online (via e-delivery)

Ameriprise statements are available in color and archived for seven years. For a list of other documents available for e-delivery, click Profile > Communication Preferences.

Questions? We're here to help. 800.862.7919

For information on how to read your statement, please visit www.ameriprise.com/microsite/statement