Kuttin Wealth Management
Ameriprise Private Wealth Advisory Practice

ACCOUNTABILITY SERVICES®
ADVISORY • ACCOUNTING • TAXES

Supporting Your Finances *Beyond Tax Season*

- Over **$14 Billion** in assets invested through Ameriprise Financial[1]
- Kuttin Wealth Management, #9 **Barron's Top 250** Private Wealth Management Teams, 2025[2]
- Team of over 200 advisors and staff, founded over 30 years ago
- Serving executives, business owners, and high-net-worth families

BRINGING WEALTH & TAX STRATEGY TOGETHER

Complimentary Initial Consultation

Connect with a financial advisor

Holistic Planning

We integrate your tax, estate, and investment strategies for **enhanced** efficiency

Proven Results

Decades of experience helping clients **grow, preserve, and transfer wealth**

Team of Specialists

In-house private wealth advisors, and **advanced planning professionals**

Is It Time for a Strategic Wealth Conversation?

Ask Yourself:

- Am I confident I'm receiving tax planning strategies that align with my goals?
- Is my investment portfolio truly aligned with my long-term goals?
- Have I protected my family and assets with insurance against unforeseen events?
- If I sold my business tomorrow, do I have a tax-efficient exit plan?
- Am I assured my wealth will be transferred smoothly to the next generation?

Contact us to get started

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Our Services

Kuttin Wealth Management
Ameriprise Private Wealth Advisory Practice

Investment Strategies	Tailored portfolios and risk management
Tax-Efficient Strategies	Coordination with your tax professional to help reduce tax drag
Business Owner Solutions	401(k), succession, and liquidity event planning
Estate & Legacy Planning Strategies	Building generational security with asset protection and insurance

Our Proven Process

1 Understanding your goals

2 Customized, tax-aligned plan

3 Adjusting as life and markets change

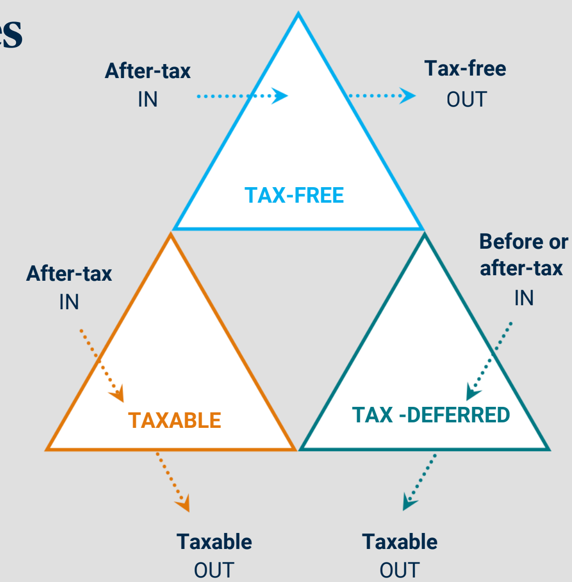
Tax-efficiency aligned to your objectives

Understanding the intricacies of your savings and retirement income objectives, we'll help you identify potential tax efficiencies for your full financial picture.

Tax-free
Investments and insurance using after-tax dollars for tax-free growth[1]

Tax-deferred
Investments using before- or after-tax dollars for tax deferred growth[2]

Taxable
After-tax dollars for taxable income[3]



[1] Certain tax-exempt income may be subject to the alternative minimum tax, or state or local taxes. Taxable income, including capital gains or losses, may be incurred.

[2] Withdrawals before age 59½ may result in tax and a 10% IRS penalty on the taxable portion of distributions.

[3] Dividends and long-term capital gains may be taxed at a lower rate. Interest may be taxable even if not received, for example, if from a CD or OID. For certain short-term debt instruments, interest is taxed at maturity. Death proceeds generally are not subject to income tax.

Partial or full surrenders from a life insurance contract (and in some cases loans) may be subject to income tax to the extent of earnings.

14B in assets invested through Ameriprise per company data as of 12.10.25

The referring professional is a client of Ameriprise Financial. They receive cash payments if you open an Ameriprise Financial account and also have a business relationship with the Ameriprise advisor. Both are an incentive to refer you to Ameriprise and create a conflict of interest.

The referring professional has an alliance with Ameriprise Financial and this advisor and can earn a referral fee of up to thirty percent of the advisory fees paid by the referred client for the duration of the investment advisory relationship for referring prospects who may benefit from Ameriprise Financial services. Payment for referrals presents a conflict of interest. Ameriprise advisors offer products and services based on appropriateness; therefore, not all referrals result in a referral payment.

Ameriprise Financial is not affiliated with *Accountability Services*.

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[2] Barron's generates its rankings from a formulaic analysis of surveys answered by candidates regarding assets, revenue, and quality of practice, including an advisor's regulatory and compliance record. Certain awards include a demographic component to qualify. This award for each applicable year is based on data from the previous two calendar years and is not indicative of this advisor's/team's future performance. Neither Ameriprise Financial nor its advisors pay a fee to Barron's in exchange for the ranking or its use. Barron's is a registered trademark of Dow Jones, L.P.; all rights reserved.

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