The Ameriprise Financial Story

We are, and have been for over a century, a company on a mission. Our advisors help clients achieve their financial goals through personal financial planning and advice. Over the years, we've helped millions of people invest and save billions of dollars for what's important to them.

The strength of our commitment is matched only by our strength as a company. Through downturns, recessions, booms and even depressions, we have always honored our financial obligations to clients.

In today's complex financial world, our advisors help clients by providing a steady voice, a listening ear and a clear vision of financial opportunities and pitfalls. Through their ongoing relationship with you, our advisors identify and tailor solutions for your specific needs. That's how, together, we help put more within reach for you and your loved ones.

Die cut with 2mm rounded corners

Financial Planning | Retirement | Investments | Insurance | Banking

Ameriprise Financial
200 Ameriprise Financial Center, Minneapolis, MN 55474
ameriprise.com

290020 (07/11)

Kisker & Associates

An Ameriprise Private Wealth Advisory Practice

Premier service, financial planning and products tailored to sophisticated needs

Ameriprise Private Wealth Advisors are among the most qualified and credentialed advisors in the industry. As part of this elite group of advisors, we have the experience and resources to help affluent clients make the most of their wealth. And we'll provide personalized recommendations and support to help you grow, protect and transfer your wealth.

It's a difference you see every time we get together

From the personal greeting at the door to the way we listen and respond, you can expect the highest level of personalized service from every member of our practice. We'll make sure every interaction you have with us exceeds your expectations. And we'll always treat you with the utmost confidentiality and respect.

Helping you identify and prioritize your objectives
We can help you evaluate investment alternatives and strategies to meet your financial needs and objectives.

Retirement planning
We'll help you make sound financial choices now, so you can maintain the lifestyle you want throughout retirement.

Income and asset management
We'll recommend effective investment strategies based on your personal risk level and help you rebalance your portfolio as the market changes.

Estate planning and wealth protection
We'll work with your other estate planning professionals to help safeguard your assets and your family's financial future.

Guidance for small business owners
We're focused on helping you manage your personal and business finances. We'll provide the specialized advice you need on debt management, employee benefits, business transition planning and estate planning — so you can retire on your own terms.

Meeting the needs of women
We'll find out your needs and goals and provide the right planning and advice, so you can make financial decisions that work for you and your loved ones. We'll review all the aspects of your finances with you. Then together, we'll create a plan with solutions to put your dreams — including a confident retirement — more within reach.

Douglas E. Kisker

CRPC®

PRIVATE WEALTH ADVISOR
BUSINESS FINANCIAL ADVISOR

Certifications and degrees

CRPC®
By completing coursework focused on key retirement issues such as asset management and estate planning, a Chartered Retirement Planning Counselor℠ is trained to help clients both assess retirement preparedness and confidently address their pre- and post-retirement financial needs.

Education
Miami University
BA, 1986

Business experience
1995 – present
Private Wealth Advisor
Ameriprise Financial Services, Inc.
Crestview Hills, KY

1992 – 1994
Financial Advisor
Ameriprise Financial Services, Inc.
Crestview Hills, KY

Personal information
Son Blair and Daughter Caroline
Enjoys Tennis and Golf
Member of Cincinnati Art Museum

Professional associations
Financial Planning Association

Community service
Volunteer with the Cincinnati Freestore Foodbank
Volunteer with the Greater Cincinnati Tennis Association

> "With the right planning and advice, you can make financial decisions that work for you, your loved ones and your future."

Matthew K. Poulos

FINANCIAL ADVISOR
An employee of an Ameriprise Financial Franchise

Education
University of Cincinnati
BS, 1999

Business experience
2011 – present
Financial Advisor
Ameriprise Financial Services, Inc.
Crestview Hills, KY

2006 – 2011
Associate Financial Advisor
Ameriprise Financial Services, Inc.
Crestview Hills, KY

Other
Volunteer at the Cincinnati Freestore Foodbank

Supporter of the Greater Cincinnati Tennis Association

John M. Wallace

CFP®, CLTC, MBA

FINANCIAL ADVISOR
An employee of an Ameriprise Financial Franchise

Education
Hamilton College
BA, 1973

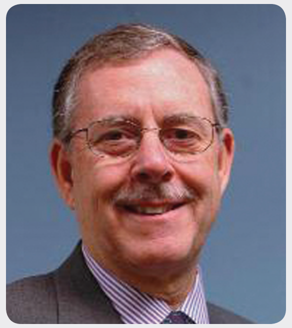
Wharton Graduate
MBA, 1975

Business experience
2010 – present
Financial Advisor
Ameriprise Financial Services, Inc.
Crestview Hills, KY

2007 – 2010
Financial Advisor
Morgan Stanley
Cincinnati, OH

2003 – 2007
Financial Advisor
Metlife Financial
Cincinnati, OH

Other
Volunteer at the Cincinnati Freestore Foodbank



Jerome Wagner III

CRPC®

FINANCIAL ADVISOR
An employee of an Ameriprise Financial Franchise

Education
Northwood University
BBA, 1974
Business Management and
Assc. Automotive Marketing

Business experience
2012 – present
Financial Advisor
Ameriprise Financial Services, Inc.
Middletown, Ohio

2008 – 2012
Financial Advisor
Merrill Lynch
Toledo, Ohio

2005 – 2008
Financial Advisor
UBS Wealth

1998 – 2005
VP Operations
Order Processing Group

Other
Volunteer at Hope Emergency Program and Cincinnati Freestore Foodbank

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Fritz M. Dlabik

ASSOCIATE
FINANCIAL ADVISOR

Education
Northern Kentucky University
Bachelors in Finance, 2009

Business experience
2012 – present
Associate Financial Advisor
Ameriprise Financial Services, Inc.
Crestview Hills, Kentucky

2011 – 2012
Paraplanner
Ameriprise Financial Services, Inc.
Crestview Hills, Kentucky

2009 – 2011
Career Agent
Ohio National Financial Group

Other
Volunteer at Cincinnati Freestore Foodbank and Little Brothers, friends of the elderly

Our team

(Front row, left to right)
Jerome Wagner III, Financial Advisor
Matthew Poulos, Financial Advisor
Douglas Kisker, Private Wealth Advisor
John Wallace, Financial Advisor
Fritz Dlabik, Associate Financial Advisor

(Back row, left to right)
Charity Flynn, Business Development Manager
Angie Scroggins, Client Service Coordinator
Maiah Le, Executive Assistant
Gabriele Vosmeier, Client Service Specialist
Joseph Troy, Paraplanner
Chastity Davis, Client Service Specialist
Stacie Key, Paraplanner
Candace Swaim, Client Concierge

Preserving wealth across generations

You've worked hard to provide a good life for your family, and you want to preserve the wealth you've built. We've helped family members — from grandparents to grandchildren — plan for their financial futures. We'll work with you to balance your priorities with the multigenerational financial issues that arise. So you can create a lasting legacy for your family and generations to come.

Exceptional knowledge and experience

As Private Wealth Advisors, we specialize in a wide range of financial areas, including retirement, insurance, asset management, and tax and estate planning strategies. We'll apply our knowledge and experience to help meet all your sophisticated financial needs. You can feel confident you're getting the highest level of service and support throughout the wealth planning process.

> "We'll apply our knowledge and experience to help meet your complex financial needs."

Focused on you, not just your investments

We understand that there's more to you than your investments. You have dreams and goals, and we're dedicated to helping you achieve them.

Because you deserve the highest level of service
We'll provide personalized service to help you with the details important to you and your family. We'll apply our knowledge and experience to help simplify your most complicated financial situations — freeing you to enjoy your life more fully.

Financial planning isn't just about numbers. It's about dreams.
We'll take a personal approach to financial planning and advice, based on your dreams — not simply the numbers. And we'll work with you to develop financial strategies to help you meet your unique challenges now and in the future. Whether you want to reduce your tax burden, prepare for a confident retirement or leave a financial legacy, we can help you plan to achieve your goals.

> "We'll help you find solutions that fit your unique situation and goals."

Neither Ameriprise Financial nor its affiliates or its representatives may provide tax or legal advice. Consult with your tax adviser or attorney regarding specific tax issues. Ameriprise Financial cannot guarantee future financial results.

> “Whenever your life changes, we’ll find new solutions to help you stay on track with your goals.”

Personal connections that can last a lifetime

As Private Wealth Advisors, we’ll use our personal *Dream > Plan > Track >*® approach to help you reach your dreams and goals. It starts with a simple conversation about what you want out of life. We’ll talk with you about all parts of your financial life and how they fit together. Once we have a clear understanding of where you are and where you want to go, we’ll decide what to focus on first. Then, with your goals in mind, we’ll build a plan with solutions that are right for your complex financial needs. And we’ll meet as often as you like to measure your progress and make sure you’re on track.

Kisker & Associates

A private wealth advisory practice of
Ameriprise Financial Services, Inc.

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