

YOUR ASSET MANAGEMENT WHOLESALING TEAM

INVESTMENT-ONLY DIVISION: ALASKA, IDAHO, MINNESOTA, MONTANA,
NEVADA, NORTH DAKOTA, OREGON, UTAH, WASHINGTON, WYOMING

Building partnerships for your business

Asset Management Regional Vice President (RVP) RVPs conduct one-on-one and seminar meetings with you to provide product positioning, client acquisition ideas and sales strategies. RVPs are a resource to help you build your business through:

- The latest intellectual capital and thought leadership with insights and analysis from our tenured investment professionals
- Exclusive services through business-building and practice management programs for asset acquisition and retention
- Access to industry-leading, bundled retirement plan services
- Access to world-class investment solutions managed

Asset Management Regional Sales Director (RSD)

Each RSD works with an RVP to provide you specific sales support and product consultation including:

- Product education and positioning
- Access to seasoned portfolio managers and their thought leadership insight
- Competitive research, market development and product-positioning suggestions generated by third-party reports
- Performance comparisons emailed to you



Kelli McNamara

Regional Vice President
508.308.2748
kelli.mcnamara@columbiathreadneedle.com

Kelli McNamara is the regional vice president in the investment-only division for Columbia Threadneedle Investments. Ms. McNamara joined the firm in 2011 and has been a member of the investment community since 2004.

Prior to joining Columbia Threadneedle Investments, Ms. McNamara worked as a regional investment consultant with Fidelity Investments. Prior to her current role she was a regional sales director at Columbia Management.

Education

- B.S. B.A in accounting from Bryant University
- FINRA Series 6, 7, 63 and 65 registrations, C(k)P[®] *Certified 401(k) Professional Designation*

About Columbia Threadneedle Investments

Columbia Threadneedle Investments is a leading global asset management group that provides a broad range of actively managed investment strategies and solutions for individual, institutional and corporate clients around the world.

With more than 2,000 people, including over 450 investment professionals based in North America, Europe and Asia, we manage \$506 billion* of assets across developed and emerging market equities, fixed income, asset allocation solutions and alternatives. We are the 11th largest manager of long-term mutual fund assets in the U.S.** and the 5th largest manager of retail funds in the U.K.***

Our priority is the investment success of our clients. We aim to deliver the investment outcomes they expect through an investment approach that is team-based, performance-driven and risk-aware. Our culture is dynamic and interactive. By sharing our insights across asset classes and geographies, we generate richer perspectives on global, regional and local investment landscapes. The ability to exchange and debate investment ideas in a collaborative environment enriches our teams' investment processes. More importantly, it results in better informed investment decisions for our clients.

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Not FDIC insured • No bank guarantee • May lose value

*In U.S. dollars as of December 31, 2014. Source: Ameriprise Q4 Earnings Release. Includes all assets managed by entities in the Columbia and Threadneedle groups of companies. Contact us for more current data.

**Source: ICI as of December 31, 2014 for Columbia Management Investment Advisers, LLC.

***Source: Investment Association as of December 2014 for Threadneedle Asset Management Limited.

Securities products offered through Columbia Management Investment Distributors, Inc., member FINRA. Advisory services provided by Columbia Management Investment Advisers, LLC.

Columbia Threadneedle Investments (Columbia Threadneedle) is the global brand name of the Columbia and Threadneedle group of companies.

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