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2025 Form 6 - Full and Public Disclosure of Financial Interests

2026 APR -7 PM 1:15 Filed with COE: 03/30/2026

General Information

DIVISION OF ELECTIONS
TALLAHASSEE, FL

Name: Kamilah LaSeth Perry

CONFIDENTIAL

PID 267701

AGENCY INFORMATION

Organization	Suborganization	Title
State Attorney; 9Th Circuit	Employees	Executive Director/General Counsel

CANDIDATE FOR

Position	Agency Name	Position sought or held
Circuit Judge	9th Judicial Circuit, Circuit Court Judge	Seat 31

Net Worth

My Net Worth as of December 31, 2025 was \$ 174,362.00.

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Filed with COE: 03/30/2026

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 \$ 2,000.00.

ASSETS INDIVIDUALLY VALUED AT OVER \$1,000:

Description of Asset	Value of Asset
Residence	\$ 430,000.00
Stocks (Ameriprise Strategic Portfolio Service Advantage)	\$ 137,159.81
Bank Account (Wells Fargo)	\$ 1,435.34
Bank Account (Regions)	\$ 16,167.41
See Attached	

Liabilities**LIABILITIES IN EXCESS OF \$1,000:**

Name of Creditor	Address of Creditor	Amount of Liability
United Wholesale Mortgage	585 S. Blvd Pontiac, Michigan 48341	\$ 398,734.00
MidFlorida Credit Union	2703 S Orange Ave, Orlando, FL 32805	\$ 11,683.00

JOINT AND SEVERAL LIABILITIES NOT REPORTED ABOVE:

Name of Creditor	Address of Creditor	Amount of Liability
N/A		

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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
State of Florida	415 N. Orange Ave, Orlando, FL 32805	\$ 184,792.56

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

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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.

Kamilah LaSeth Perry

Digitally signed: 03/30/2026

Filed with COE: 03/30/2026



Your Ameriprise statement

for February 1, 2026 to February 28, 2026

PREPARED FOR KAMILAH L PERRY

Your personal advisor

Kimberly R Stewart CFP® CLU® CLTC®

KRS Wealth Management

A private wealth advisory practice of Ameriprise Financial Services, LLC

513 N Parramore Ave

Orlando, FL 32801

407.425.9101

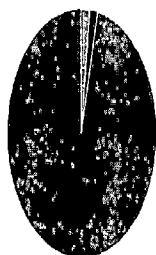
Kimberly.R.Stewart@ampf.com

www.ameripriseadvisors.com/kimberly.r.stewart

Value of your investment accounts

	This month	This year
Beginning value	\$143,868.73	\$144,647.40
Net deposits & withdrawals	\$0.00	\$0.00
Dividends, interest & income	\$26.57	\$164.45
Change in value	-\$6,735.49	-\$7,652.04
Ending value	\$137,159.81	\$137,159.81

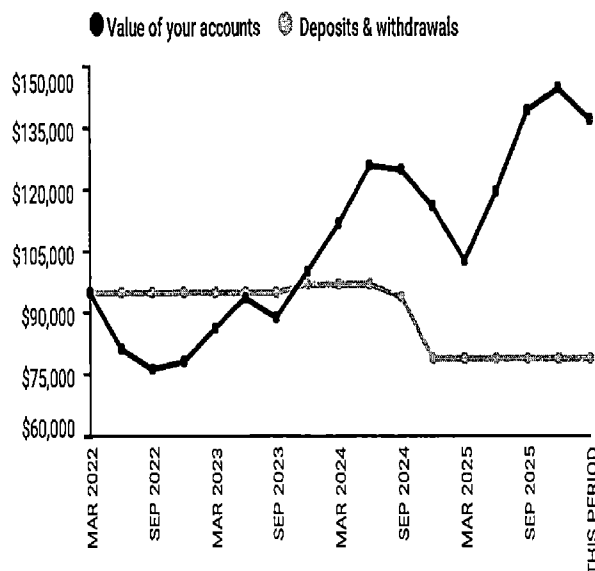
Your asset allocation



Asset class	Value on Feb 28, 2026	Percent of assets
● Cash & cash investments*	\$2,673.66	1.9%
● Fixed income	\$2,383.16	1.7%
● Equities	\$132,102.99	96.4%
Total assets	\$137,159.81	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.

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.

As a client, you can easily access your tax statements and other important documents online. Log in to the secure site on ameriprise.com today.

KAMILAH L PERRY CLIENT ID:

GROUP ID: 1395 0046 6 001

000000102/27/2026 E I#

FEB 01, 2026 TO FEB 28, 2026 | Page 1 of 12

Summary of your accounts

The first page, the Summary of your account pages and the Important Disclosures page constitute a Summary Statement provided by AEIS which includes both brokerage and managed accounts held by AEIS, and other assets held by various Ameriprise affiliated entities responsible for providing underlying account statements. Summary statements that include brokerage may include held away assets; refer to Brokerage Statement pages for details. Each product has detail pages in the statement provided by those entities pursuant to the applicable regulations. Any information in the summary statement is provided for convenience purposes, including assets not held by AEIS or AFS. The underlying product pages are the official record of your account. See Important Disclosures page for responsibilities of each legal entity.

Should you choose to sell your entire portfolio or a holding in an account, the total amount received may not be the same as the ending value noted here due to sales or surrender charges, tax withholding, outstanding loans or other fees that may apply at the time of sale.

Page		Beginning value	Deposits	Withdrawals	Dividends, interest & income	Change in value	Ending value
Personal investment accounts							
KAMILAH L PERRY							
3	STRATEGIC PORTFOLIO SERVICE ADVANTAGE © Available cash: \$1,716.24	\$128,205.50	\$0.00	\$0.00	\$26.55	-\$7,609.64	\$120,622.41
	Total personal investment accounts	\$128,205.50	\$0.00	\$0.00	\$26.55	-\$7,609.64	\$120,622.41
Retirement investment accounts - tax qualified							
KAMILAH L PERRY ROTH IRA							
6	STRATEGIC PORTFOLIO SERVICE ADVANTAGE	\$15,663.23	\$0.00	\$0.00	\$0.02	\$874.15	\$16,537.40
	Total retirement investment accounts - tax qualified	\$15,663.23	\$0.00	\$0.00	\$0.02	\$874.15	\$16,537.40
	Total of all accounts	\$143,868.73	\$0.00	\$0.00	\$26.57	-\$6,735.49	\$137,159.81

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				
KAMILAH L PERRY ROTH IRA PLAN	0007 997 637	\$0.00	\$0.00	\$0.00
Total retirement plan		\$0.00	\$0.00	\$0.00

AMERIPRISE STRATEGIC PORTFOLIO SERVICE ADVANTAGE

Account #: XXXXXXXXXX

KAMILAH L PERRY TOD

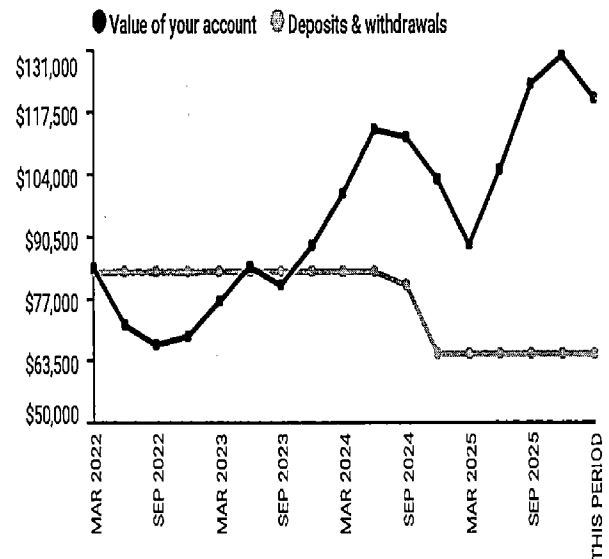
Investment time frame: 11+ years; Risk tolerance: Aggressive; Investment objective: Growth; Liquidity needs: 7+ Years

See the Disclosures at the end of your statement for definitions of these suitability terms.

Value of your account

	This period	This year
Beginning value	\$128,205.50	\$129,697.13
Income		
Dividends	\$26.51	\$26.51
Interest	\$0.04	\$0.10
Total income	\$26.55	\$26.61
Change in value	-\$7,609.64	-\$9,101.33
Ending value	\$120,622.41	\$120,622.41

Value of your account over time



Summary of your holdings

Asset	Value of assets	Percent of account
Cash and equivalents	\$1,716.24	1.4%
Stocks and ADRs	\$118,906.17	98.6%
Ending value	\$120,622.41	100.0%

Your holdings

Description	Ending value this period ⁷	Ending value last period	Net change this period	Estimated Annual income	Yield
Cash and equivalents					
Ameriprise Insured Money Market (AIMMA) ²	\$1,716.24			\$0.48	0.03%
Ameriprise Bank FSB Minneapolis MN	\$1,716.24				
Total Cash and equivalents⁵	\$1,716.24	\$1,880.44	-\$164.20	\$0.48	

Description	Symbol/CUSIP	Quantity	Market X price	Ending value = this period ⁷	Ending value last period	Net change this period	Total cost basis ¹	Estimated Unrealized gain/loss	Annual income	Yield
Stocks and ADRs										
ALPHABET INC CL C	GOOG	100.000	\$311.43	\$31,143.00	\$33,853.00	-\$2,710.00	\$13,146.00	\$17,997.00	\$84.00	0.27%
APPLE INC	AAPL	102.043	\$264.18	\$26,957.71	\$26,453.20	\$504.51	\$16,696.70	\$10,261.02	\$106.12	0.39%

AMERIPRISE STRATEGIC PORTFOLIO SERVICE ADVANTAGE (continued)

Account #

Your holdings - continued

Description	Symbol/ CUSIP	Quantity	Market X price	Ending value = this period ⁷	Ending value last period	Net change this period	Estimated			Yield
							Total cost basis ¹	Unrealized gain/loss	Annual income	
Stocks and ADRs										
MICROSOFT CORP	MSFT	64.591	\$392.74	\$25,367.46	\$27,792.86	-\$2,425.40	\$21,971.39	\$3,396.08	\$235.11	0.93%
NVIDIA CORP	NVDA	200.000	\$177.19	\$35,438.00	\$38,226.00	-\$2,788.00	\$9,093.20	\$26,344.80	\$8.00	0.02%
Total Stocks and ADRs				\$118,906.17	\$126,325.06	-\$7,418.89	\$60,907.29	\$57,998.90	\$433.23	
Total account holdings				\$120,622.41	\$128,205.50	-\$7,583.09	\$60,907.29	\$57,998.90	\$433.71	

¹ Cost basis is used to determine capital gain or loss for tax purposes. It is the original cost of the asset, adjusted for certain activity, including reinvested dividends, reinvested capital gain distributions (for mutual funds), sales charges, transaction fees, wash sales, accrued discounts and premiums (for bonds), returns of capital and corporate actions, where applicable. Other adjustments may apply.

² Ameriprise Insured Money Market Account (AIMMA) 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 AIMMA, 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.

Your account activity

Date	Transaction	Description	Symbol/ CUSIP	Quantity	Price	Amount
Trade activity						
Securities purchased						
02/12/2026	REINVEST DIV	APPLE INC REINVEST AT 275.396 DIVIDEND REINVESTMENT	AAPL	0.096		-\$26.51
Income						
02/12/2026	DIVIDEND	APPLE INC 021226 101.94700	AAPL			\$26.51
02/27/2026	INTEREST	AMERIPRISE INSURED MONEY MARKET ACCOUNT 022726 APYE .02%		1,716		\$0.04
Total Income						\$26.55
Fees						
02/17/2026	FEE	ASSET-BASED BILL VAL 128,205.50 02/01/26 THRU 02/28/26				-\$164.24

AMERIPRISE STRATEGIC PORTFOLIO SERVICE ADVANTAGE (continued)

Account #: [REDACTED]

Your account activity - continued

Date	Transaction	Description	Symbol/ CUSIP	Quantity	Price	Amount
Other activity						
02/27/2026	INTEREST REINVEST	AMERIPRISE INSURED MONEY MARKET ACCOUNT				-\$0.04
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
02/17/2026	SALE	AMERIPRISE INSURED MONEY MARKET ACCOUNT	\$164.24

AMERIPRISE STRATEGIC PORTFOLIO SERVICE ADVANTAGE

Account #: [REDACTED]
Plan ID: [REDACTED]

AMERIPRISE TRUST COMPANY | C/O KAMILAH L PERRY | AS CUSTD FOR THE KAMILAH L PERRY | ROTH CONTRIBUTORY IRA

Investment time frame: 11+ years; Risk tolerance: Moderate/Aggressive; Investment objective: Growth; Liquidity needs: 7+ Years
See the Disclosures at the end of your statement for definitions of these suitability terms.

Value of your account

	This period	This year
Beginning value	\$15,663.23	\$14,950.27
Income		
Dividends	\$0.00	\$137.80
Interest	\$0.02	\$0.04
Total income	\$0.02	\$137.84
Change in value	\$874.15	\$1,449.29
Ending value	\$16,537.40	\$16,537.40

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.

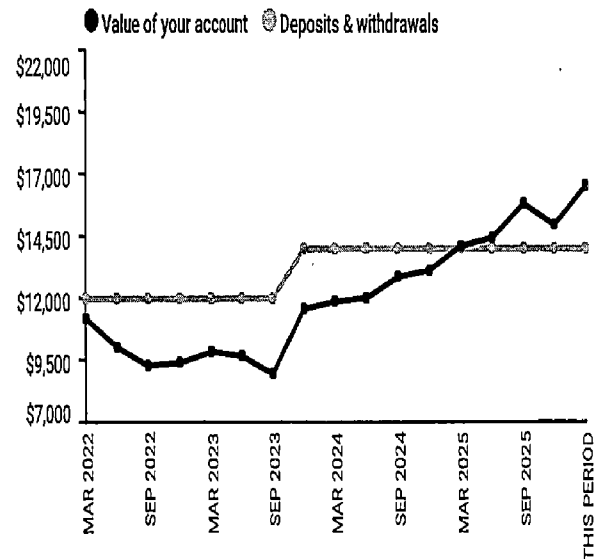
If your financial or tax professional uses your December 31 value to aid in certain calculations, please share this information with them. For example, certain clients may need to use the year-end value when calculating their required minimum distributions.

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	\$753.15	4.6%
Mutual funds	\$6,809.05	41.2%
Stocks and ADRs	\$8,975.20	54.2%
Ending value	\$16,537.40	100.0%

Value of your account over time



AMERIPRISE STRATEGIC PORTFOLIO SERVICE ADVANTAGE (continued)

Account #

Your holdings

Description	Ending value this period ⁷	Ending value last period	Net change this period	Estimated	
				Annual income	Yield
Cash and equivalents					
Ameriprise Insured Money Market (AIMMA) ²	\$753.15			\$0.26	0.03%
Ameriprise Bank FSB Minneapolis MN	\$753.15				
Total Cash and equivalents ⁵	\$753.15	\$773.19	-\$20.04	\$0.26	

Description	Symbol/ CUSIP	Quantity	X Market price	Ending value = this period ⁷	Ending value last period	Net change this period	Estimated	
							Annual income	Yield
Mutual funds								
COLUMBIA BALANCED INSTL CL	CBALX	123.846	\$54.98	\$6,809.05	\$6,831.34	-\$22.29	\$121.70	1.79%
Stocks and ADRs								
ALTRIA GROUP INC	MO	130.000	\$69.04	\$8,975.20	\$8,058.70	\$916.50	\$551.20	6.14%
Total account holdings				\$16,537.40	\$15,663.23	\$874.17	\$673.16	

² Ameriprise Insured Money Market Account (AIMMA) 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 AIMMA, 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.

Your account activity

Date	Transaction	Description	Symbol/ CUSIP	Quantity	Price	Amount
Income						
02/27/2026	INTEREST	AMERIPRISE INSURED MONEY MARKET ACCOUNT 022726 APYE .03%	753			\$0.02
Fees						
02/17/2026	FEE	ASSET-BASED BILL VAL 15,663.23 02/01/26 THRU 02/28/26				-\$20.06

AMERIPRISE STRATEGIC PORTFOLIO SERVICE ADVANTAGE (continued)

Account # [REDACTED]

Your account activity - continued

Date	Transaction	Description	Symbol/ CUSIP	Quantity	Price	Amount
Other activity						

02/27/2026	INTEREST REINVEST	AMERIPRISE INSURED MONEY MARKET ACCOUNT				-\$0.02
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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
02/17/2026	SALE	AMERIPRISE INSURED MONEY MARKET ACCOUNT	\$20.06

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.

Ameriprise® Managed Accounts: It is important to review your personal financial condition on a periodic basis. Contact your financial advisor if there are any changes to your financial condition, investment objectives, or if you would like to request any reasonable investment restrictions on the trading or management of your discretionary managed account(s).

For most mutual funds, a share class that does not have a sales-load and does not assess 12b-1 fees (collectively "Advisory Shares") is offered in all Ameriprise Managed Account Programs as the only mutual fund share class, where available to us through a selling agreement. If not available to us through a selling agreement or if the mutual fund does not offer an Advisory Share class, we offer Class A shares that may pay a 12b-1 fee or a no-load share class that does not have a sales-load but that may pay a 12b-1 fee. The share class offered by AFS for a particular mutual fund is the only share class we allow for additional purchase within your managed account. Where share classes that do not match the Advisory Share class or other share class offered by AFS for a particular mutual fund ("Non-Matching Shares") are transferred into your account, we may convert Non-Matching Shares to an Advisory Share class of the same mutual fund, as long as the mutual fund company allows these conversions to be processed on a tax-free exchange basis for non-qualified account holdings. In this event, you will see activity for the removal of the Non-Matching Shares and activity for the receipt of the Advisory Share positions on the same date. Any 12b-1 fees received by AFS will be promptly rebated to your Managed Account and you will see a 12b-1 rebate credit on your statement activity. **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 www.ameriprise.com/aeisfinancialstatement. You may also obtain a free copy by mail by calling us at 800.297.7378.

AEIS, 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, 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.

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/AMP_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 exchanges 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 for directing orders to a particular broker or dealer for execution. The source and amount of 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 Advisory 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/TICs, 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, dating 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, 10% withholding for non-periodic distributions from IRAs and non-qualified annuities and wage table 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.

KAMILAH L PERRY

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Messages for you

Your 2025 annual financial statement is available exclusively online. This statement is a summary of all your account activity that occurred in 2025. Log in to the secure site on ameriprise.com, then click 'Documents' to view yours today.



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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.

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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