

Columbia Management Announces Strategic Rebrand

Columbia Management will rebrand its business as Columbia Threadneedle Investments in the first half of 2015. The new global brand will represent the combined capabilities, resources and reach of Columbia Management and U.K.-based Threadneedle Investments, offering clients access to the best of both firms.

Threadneedle has assets under management (AUM) of \$150 billion¹ and is the fifth largest retail manager in the U.K.² Together, Columbia Management and Threadneedle have \$505 billion¹ in AUM across developed and emerging market equities, fixed income, multi-asset solutions and alternatives.

The new brand – Columbia Threadneedle Investments – will reinforce the strength of both firms in established markets of the U.S., U.K., and Europe and enable the group to grow its presence in key markets such as Asia Pacific, Latin America and the Middle East. Established fund names, investment teams, strategies, processes and legal entities will not change as a result of the new global brand.

“This is an important and exciting new phase for us. We are bringing together a combined offering under the Columbia Threadneedle Investments global brand for the benefit of our clients and our business,” said Ted Truscott, CEO – Global Asset Management. “Columbia and Threadneedle have worked together for more than two years to increase the breadth and depth of our offering to clients. Presenting the combined capabilities of both firms under a single brand is the natural next step. We are introducing the Columbia Threadneedle Investments brand to reflect the significant resources and expertise available around the globe. By working together, we add depth to our offerings, enabling us to make better investment decisions and ultimately generate better performance for our clients. Clients around the world benefit from our combined research ideas and insights, trading techniques and portfolio strategies.”

Columbia Threadneedle Investments – Key Facts (on an aggregated basis):

- > \$505 billion in assets under management¹
- > Over 2,000 people and over 500 dedicated investment professionals³
- > Locations in 18 countries across North America, Europe, Asia Pacific and the Middle East
- > Investment offices in London, Singapore, Boston, Minneapolis, New York, Chicago, Portland, Oregon, and other U.S. locations
- > 11th largest manager of long-term funds in the U.S.,⁴ 5th largest retail manager in the U.K.²
- > 121 funds are Morningstar 4- or 5-star rated⁵

In a world where financial markets and economies are increasingly interconnected, being part of a strong global partnership with our colleagues at Threadneedle is a considerable advantage. We will keep you informed as this strategic business initiative unfolds. If you have any questions about this information, please call an Intermediary Liaison Associate at 800.441.4020 option #2.

Past performance is not a guarantee of future results. There is no guarantee that return expectations will be met.

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¹ As of September 30, 2014

² IMA as of October 31, 2014

³ As of December 1, 2014

⁴ ICI as of October 31, 2014

⁵ Threadneedle Investments and Columbia Management as of September 30, 2014 (funds may not be available in all jurisdictions)

For each fund with at least a three-year history, Morningstar calculates a Morningstar Rating™ based on a Morningstar Risk-Adjusted Return measure that accounts for variation in a fund's monthly performance (including the effects of sales charges, loads, and redemption fees), placing more emphasis on downward variations and rewarding consistent performance. The top 10% of funds in each category receive 5 stars, the next 22.5% receive 4 stars, the next 35% receive 3 stars, the next 22.5% receive 2 stars and the bottom 10% receive 1 star. (Each share class is counted as a fraction of one fund within this scale and rated separately, which may cause slight variations in the distribution percentages.)

Of the 121 funds that are 4- or 5-star rated by Morningstar, 54 are Columbia Management mutual funds and 67 are Threadneedle Investments mutual funds. The Morningstar Rating™ for the Columbia Management Mutual funds is for class Z shares only; other classes may have different performance characteristics and may have different ratings. **Class Z shares are sold at net asset value and have limited eligibility. Columbia Management offers multiple share classes, not all necessarily available through all firms, and the share class ratings may vary. Contact us for details.**

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