

News Release

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Melda Mergen to Become Global Head of Equities

Planned succession follows appointment of William Davies as Global CIO

BOSTON – July 15, 2021 – Columbia Threadneedle Investments today announced that, as part of a planned transition, Melda Mergen, Deputy Global Head of Equities, will succeed William Davies as Global Head of Equities on October 1, 2021. As previously announced, Mr. Davies will assume the role of Global Chief Investment Officer in January 2022 when current Global CIO Colin Moore retires from the firm. Ms. Mergen will continue to report to Mr. Davies when she assumes her new role.

Ms. Mergen has made significant contributions to the firm in research, portfolio management and investment oversight roles since joining a predecessor firm to Columbia Threadneedle in 1999. She assumed her current role as Deputy Global Head of Equities, overseeing the U.S. equity investment team, in 2017, having previously served as Head of U.S. Equities and prior to that leading the investment oversight team. In her new role, Ms. Mergen will lead Columbia Threadneedle's equity investment teams across the U.S., EMEA and APAC.

In addition to her leadership responsibilities, Ms. Mergen co-manages several large-cap equity strategies. She will continue to manage portfolios when she assumes her new role and there is no change to the investment process that underpins these strategies. Ms. Mergen is also co-chair of the firm's North America Diversity & Inclusion Group.

Mr. Davies said: "Melda is a highly respected investor and proven leader with a strong track record in delivering consistently competitive investment performance and research-driven solutions for our clients. We have worked together for many years and I am confident that the leadership and continuity she brings to the role will serve our clients well."

Columbia Threadneedle's team of almost 200 equity professionals globally manages over \$311 billion in assets, across market capitalizations, sectors and geographies from investment centers in Boston, Chicago, London, Menlo Park, Minneapolis, New York, Portland, Singapore and Stamford.

Notes to editors

About Melda Mergen, CFA, CAIA

Melda Mergen is Deputy Global Head of Equities for Columbia Threadneedle Investments. In this role she leads the company's U.S. equity investment team capabilities. Ms. Mergen is also a portfolio manager for the Columbia Select Large Cap Equity strategy, Columbia Large Cap Growth strategy and Columbia Global Value strategy. Prior to her current role, Ms. Mergen was Head of U.S. Equities from 2014 to 2017 and led the '5P' Investment Oversight team from 2004 to 2014. Before that, Ms. Mergen was a senior equity quantitative research analyst. Ms. Mergen joined one of the Columbia Threadneedle Investments legacy firms in 1999 and has been a member of the investment community since then. Ms. Mergen received a BA in economics from Bogazici University and an MBA from the University of Massachusetts at Amherst. She is a member of the Boston Security Analysts Society and the CFA Institute. In addition, she holds the Chartered Financial Analyst® and Chartered Alternative Investment Analyst® designations.

About Columbia Threadneedle Investments

Columbia Threadneedle Investments is a leading global asset manager that provides a broad range of 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 \$564 billion¹ of assets across developed and emerging market equities, fixed income, asset allocation solutions and alternatives.

Columbia Threadneedle Investments is the global asset management group of Ameriprise Financial, Inc. (NYSE: AMP). For more information, please visit columbiathreadneedleus.com. Follow us on [Twitter](#).

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

¹ As of March 31, 2021. Includes all assets managed by entities in the Columbia and Threadneedle group of companies.

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