

Navigate through *Practice Transition*

For advisors considering a move, these 5 elements can help guide your practice to a successful transition.



Dedicated team

Find a firm that affords a team dedicated to guiding you through key steps.



Digital tools & resources

Ask how digital tools and resources can automate and simplify your transition.



Transition support

Determine whether they offer high-quality support before, during and after the move.



Client-focused

Verify that they match your passion for delivering exemplary client service.



Broad experience

Ensure they have extensive experience onboarding all types of practices.



See how Ameriprise can help you transition – and transform – your practice.

Visit joinameriprise.com/transition.

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