

\$192M AUM Team Partners With Ameriprise

By **Joyce Blay**

CROSSTOWN FINANCIAL ADVISORS, AN INDEPENDENT practice with offices in Sugar Grove and Lisle, Ill., has joined Ameriprise Financial.

Crosstown Financial Advisors, which includes financial advisors Christopher Forbes, Thomas Morrissy, Kathleen Morrissy and David Servatius, was formerly with Waddell & Reed, where the practice helped clients manage \$192 million in client assets, according to a news release.

Late last year, the Crosstown Financial Advisors team decided it was in theirs and their clients' best interests to begin a due diligence search for a new partner after the Macquarie Group announced plans to acquire Waddell & Reed.

"Ameriprise gave us confidence that they would not only guide us through the transition process, but they would also support our future growth," Forbes said in the news release. "The technology platform far exceeded our expectations. It's a game changer that clients only need one login to see progress toward achieving their goals."

Financial Advisor Thomas Morrissy said he plans to retire later this year after 32 years of industry service.

"I have peace of mind that my clients will be in good hands," he said in the news release. "Ameriprise has a strong reputa-



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Christopher Forbes

Financial Advisor
Founder of Crosstown Financial Advisors
A financial advisory practice of
Ameriprise Financial Services, LLC
Sugar Grove, IL

tion for serving clients with integrity. My fellow team members—particularly my daughter, Kathleen—are surrounded by leaders and corporate office experts who are ready and able to support their personal and practice growth."

Ameriprise Senior Field Vice President Trish Moll will support the team locally.

Founded in 1894, Ameriprise Financial Inc. is a diversified financial services company and bank holding company incorporated in Delaware and headquartered in Minneapolis. **FA**

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