

Advisor Team with \$320 Million in Assets Joins Ameriprise Financial for Advisor-Client Experience and Practice Management Tools and Expertise

The team looks forward to “deepening client relationships and driving efficiencies in our practice with the programs, tools and support of Ameriprise”

MINNEAPOLIS – February 28, 2024 – Financial advisors **Jim Guthrie CFP®**, **CRPC™**, **MBA** and **Stephen Rouner** recently joined the branch channel of Ameriprise Financial, Inc. (NYSE: AMP) from Merrill Lynch with \$320 million in client assets in Tacoma, Washington. The advisors are joined by Registered Client Service Associate **Nick Vanderlinda** and their practice operates under the name **Guthrie Rouner Group**.

Guthrie Rouner Group joined Ameriprise Financial for several reasons:

- **Focus on delivering an outstanding advisor-client experience.** “Top of our list was joining a firm fully committed to the advisor-client experience,” said Guthrie. “The tools and technology at Ameriprise make the process of working with clients more efficient and allow for us to build even stronger relationships.”
- **Operational efficiency.** “Leveraging the firm’s practice management tools and systems, we’re able to create efficiencies that free up more time for us to connect with clients and grow our business,” shared Rouner.
- **Defined career path for staff members who want to become financial advisors.** “The coaching, training and development programs at Ameriprise provide a clear glide path to help our staff members transition from support roles to client-facing advisor roles when they’re ready for that stage of their careers,” said Guthrie.
- **Comprehensive financial planning.** “The planning software at Ameriprise is easy to use, powerful and comprehensive,” said Rouner. “This capability will allow us to offer a more robust financial planning experience to clients with less prep time behind the scenes because of the technology integration across multiple systems.”

“We look forward to deepening client relationships and driving efficiencies in our practice with the programs, tools and support of Ameriprise,” said Guthrie.

Guthrie Rouner Group is supported locally by Ameriprise Branch Manager **David Cook**, Ameriprise Complex Director **Peter Groeschel** and Ameriprise Regional Vice President **Jamie Frisone**.

Ameriprise Financial has continued to attract experienced, productive financial advisors, with more than 1,700 joining the firm in the last 5 years.¹ 90% of advisors who joined Ameriprise say the firm’s technology, financial planning capabilities and ability to acquire clients is better than their previous firm.² To find out why experienced financial advisors are joining Ameriprise, visit ameriprise.com/why.

About Ameriprise Financial

At Ameriprise Financial, we have been helping people feel more confident about their financial future for more than 130 years. With extensive investment advice, asset management and insurance capabilities and a nationwide network of approximately 10,000 financial advisors³, we have the strength and expertise to serve the full range of individual and institutional investors' financial needs.

¹ Ameriprise Financial 2023 10-K.

² Ameriprise asked experienced advisors who moved their book of business to the firm in the last one-to-five years to compare its support, resources, and capabilities to their previous firm and state their satisfaction with their experience. The survey results identified the top ways Ameriprise stands out compared to competitors. 294 advisors responded to the “*Ultimate Advisor Partnership*” survey, which was conducted in November 2021..

³ Ameriprise Financial Q3 2023 Earnings Release.

Ameriprise Financial cannot guarantee future financial results.

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