Advisory Team With Over $140 Million in Assets Joins Ameriprise Financial for Deeper Planning Capabilities and a More Personalized Client Experience

Fair Oaks Wealth Management, led by financial advisor Bob Halbert CFP®, AAMS®, CRPS™, joins the independent channel of Ameriprise from Edward Jones

MINNEAPOLIS – April 20, 2026 – Financial advisory practice **Fair Oaks Wealth Management** recently joined the independent channel of Ameriprise Financial, Inc. (NYSE: AMP) from Edward Jones in York, Pa., where they managed more than $140 million in client assets. The practice is led by financial advisor **Bob Halbert CFP®, AAMS®, CRPS™**, and includes financial planning specialist Deborah Purpora and office manager and marketing coordinator **Bonnie Dietz**.

Halbert and team chose to affiliate with Ameriprise to bring their long-term vision for Fair Oaks Wealth Management to life – one centered on delivering a more personalized client experience, deepening financial planning relationships, and creating meaningful, generational impact for the families they serve.

"With the transition to Ameriprise, we're able to truly build a distinctive personal brand and client experience that reflects who we are and how we serve," said Halbert. "We're now able to deliver more thoughtful, customized financial plans – supported by expanded planning capabilities and a culture that values personalization. With Ameriprise, it feels like the sky's the limit."

Halbert also highlighted how increased flexibility and scalability at Ameriprise enable him to serve both clients and his team with even greater intention. "The ability to scale my practice in a meaningful way was incredibly important," he said. "As we grow, I'm excited about the career development opportunities this creates for our team – giving each member the chance to pursue the areas they're most passionate about. That flexibility empowers us to innovate, elevate our client experience, and ultimately make a positive difference for everyone connected to our practice."

"In simple terms, we're now able to do more for our clients," Halbert added. "It's our responsibility to listen, learn and develop plans that reflect each client's unique goals. Now, with the expanded capabilities, resources and support of Ameriprise, we're better able to meet clients where they are and help them achieve what matters most, both today and for generations to come."

Fair Oaks Wealth Management provides comprehensive advice to clients to help them achieve the goals they have for themselves and their families. The practice is supported locally by Ameriprise Franchise Field Vice President **Matthew Roesser** and Ameriprise Regional Vice President **Tom North**.

Ameriprise has continued to attract experienced, productive financial advisors, with approximately 1,700 joining the firm in the last 5 years.[1] To find out why experienced financial advisors are joining Ameriprise, visit ameriprise.com/why.

About the Ameriprise *Ultimate Advisor Partnership*

The Ameriprise *Ultimate Advisor Partnership* offers a differentiated experience for advisors that helps them accelerate growth while delivering an excellent client experience. Combined with the company's culture of support and independence, the *Ultimate Advisor Partnership* enables advisors to scale their businesses, deepen client relationships and drive referrals for future growth.

About Ameriprise Financial

At Ameriprise Financial, we have been helping people feel confident about their financial future for more than 130 years[2]. With extensive investment advice, global asset management capabilities and insurance solutions, and a nationwide network of more than 10,000 financial advisors, we have the strength and expertise to serve the full range of individual and institutional investors' financial needs.

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[1] Ameriprise Financial Q4 2024 Earnings Release.

[2] Company founded June 29, 1894.

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