

## Advisor with Nearly \$100 Million in Assets Joins Ameriprise for Client Focus, Innovative Technology, and Potential for Growth

### *Ireen Sommer says her clients already feel proud to be working with Ameriprise*



**MINNEAPOLIS – April 12,** – Financial advisor *Ireen Sommer* recently joined the branch channel of Ameriprise Financial, Inc. (NYSE: AMP) from Wells Fargo Advisors in Minnetonka, Minn. with nearly \$100 million in client assets. Sommer was attracted to Ameriprise’s client focus, innovative technology, and balance of freedom and support to run her practice according to her goals.

Sommer began exploring a move two years ago. She narrowed her options to two branch firms and two independent firms and evaluated them extensively against her criteria: a firm with a client-focused culture, a positive reputation, an innovative technology platform, and the right balance of freedom and support to serve her clients well. After meeting Ameriprise branch manager **Adam Lukens** and connecting with many members of the firm’s executive leaders at a special event for prospective advisors in Minneapolis, she found Ameriprise to be the best fit.

“My decision came down to where I can best deliver advice to clients and Ameriprise was the clear choice,” said **Sommer**. “The firm’s values, notably their strong commitment to clients, is paramount. You can see it in the way Ameriprise continually invests in technology for clients and advisors, provides personalized support from leadership, and makes a wide suite of products available to take care of clients’ needs.”

#### **Joining Ameriprise was best for Sommer and her unique client base**

Sommer’s client base are primarily retirees, farmers, business owners and pre-retirees. She felt confident moving her practice to Ameriprise knowing that the firm’s culture and values matched that of her clients. Sommer is supported by client service associate **Blythe Bittman**, who has been with Ameriprise for 10 years and is adept at efficiently moving business, setting up client accounts according to their preferences, and serving clients with the utmost care.

Prior to joining Ameriprise, Sommer was apprehensive about moving firms because she takes her role in supporting clients’ financial goals very seriously. Once she found the right firm, she found the transition process to be manageable. Reflecting on her transition experience, **Sommer** said, “The transition has gone smoothly so far, and I am confident I made the decision that was in my clients’ best interest and my own. Several of my clients have seen the Ameriprise commercials detailing the firm’s accolades and have told me they’re proud to be here.”

**Lukens** said, “Ireen is the epitome of an advisor who is in a great position to excel at Ameriprise: a compassionate advisor who has longstanding relationships with clients and who wants to grow to help more families achieve financial success. As leaders, we’re here to partner with her and all of our advisors to support their ambitions for growth.”

Ameriprise has continued to attract experienced, productive financial advisors, with approximately 1,600 joining the firm in the last 5 years<sup>1</sup>. To find out why experienced financial advisors are joining Ameriprise, visit [ameriprise.com/why](https://ameriprise.com/why).

#### **About Ameriprise Financial**

At Ameriprise Financial, we have been helping people feel confident about their financial future for more than 125 years. With extensive advisory, asset management and insurance capabilities and a nationwide network of approximately 10,000 financial advisors<sup>2</sup>, we have the strength and expertise to serve the full range of individual and institutional investors’ financial needs. For more information, or to find an Ameriprise financial advisor, visit [ameriprise.com](https://ameriprise.com).

<sup>1</sup> Ameriprise Financial 2021 10-K.

<sup>2</sup> Ameriprise Financial Q4 2021 Earnings Release.

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