Ameriprise Financial Welcomes Jennifer Marcontell and Her Team, Top-Ranked Advisor Practice with $1.7 Billion in Assets

Marcontell says Ameriprise Independent Channel is the right fit for her high-net worth families and her team

MINNEAPOLIS – July 5, 2022 – A top-ranked Barron's financial advisor, **Jennifer Marcontell, CFP®, ChFC®, AAMS®, CRPC®, APMA® and her team,** recently joined the independent channel of Ameriprise Financial, Inc. (NYSE: AMP) from Edward Jones in Baytown, Texas with $1.7 billion in assets. Marcontell and her team, who now operate under the name **Marcontell Wealth Management**, a financial advisory practice of Ameriprise Financial Services, LLC, transitioned to Ameriprise to take their wealth management capabilities to the next level with enhancements offered by Ameriprise's integrated technology platform. With innovative digital tools and improved efficiency for their practice, Marcontell Wealth Management is focused on delivering an exceptional, client-first service experience to the families they serve.

Before making the move, Marcontell and her team thoughtfully explored a variety of firms, assessing each one against their criteria: a client-first culture, sophisticated investment platform, and integrated technology that supports the advisor-client relationship. Ameriprise provided the solutions she and her team were seeking and offered them the flexibility to curate the service experience they envision for their clients. She found the firm's independent channel to have the mix of support and flexibility.

"Our relationships with the families and individuals we serve are the foundation of everything we do as a team," said Marcontell, who has more than 20 years of experience helping clients reach their financial goals. "I'm confident that the transition to Ameriprise will help us strengthen those relationships even further, by enabling us to streamline our service model and harness the firm's impressive range of integrated solutions."

Marcontell found Ameriprise to be her choice after meeting personally with many members of firm leadership, including **Timari Robison**, Ameriprise's National Women's Recruiting Director.

"We're thrilled to welcome Jennifer and her team to the Ameriprise family," said Robison. "Our goal is to be the firm of choice for quality advisors, offering them the chance to grow their practices and develop their teams based on their vision and growth goals. The level of trust Jennifer and her team have with their clients is remarkable, and she recognized she and her team could be doing even more for them with Ameriprise behind her."

Decision to join Ameriprise was best for Marcontell, her clients, and her team

Marcontell Wealth Management will maintain tight-knit, longstanding relationships with their high-net worth clients, many of whom are in energy and chemical industries and navigating life transitions. They work with approximately 450 families who have more than $4 million, on average. Marcontell and her team feel confident joining Ameriprise because of the firm's unrivaled focus on delivering a comprehensive client experience through financial planning and advice.

Additionally, the move to Ameriprise allows Marcontell and her team to further build out their practice brand, capitalize on efficiencies, and provide development opportunities for their team.

"When I thought about the future of my practice, it became clear that I needed to find ways to increase our efficiency and provide development opportunities for my team members. At Ameriprise, I can empower my team members to take on greater roles in delivering exemplary service to our clients. The firm offers a wealth of resources, including critical digital capabilities that create capacity for us to spend more time with the families and individuals we serve," said **Marcontell**.

Marcontell's team also includes Associate Financial Advisor **Allie Gwynn AAMS®**, Associate Financial Advisor **Todd Patton**, Operations Coordinator **Ryan Heard**, Operations Specialist **Tenna Howard**, Client Service Specialist **Alicia Bryan**, Marketing Specialist **Kenzie Lackey**, Client Service Specialist **Victoria Gonzalez**, and Associate Financial Advisor **Erik Pettine**. Ameriprise Regional Vice President **Tres Rouquette** and Ameriprise Field Vice President **Logan Clipp** support the team.

Ameriprise has continued to attract experienced, productive financial advisors, with approximately 1,600 joining the firm in the last 5 years.[1] Nine out of ten 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 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[3], 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.

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[1] Ameriprise Financial 2021 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 Q1 2022 Earnings Release.