Advisor with Nearly $150 Million in Assets Joins Ameriprise For Client-Centric Culture and Industry-Leading Technology

Paul Holt joined Ameriprise from Raymond James to better serve clients

MINNEAPOLIS – July 28, 2022 – Financial advisor **Paul Holt** recently joined Ameriprise Financial, Inc. (NYSE: AMP) from Raymond James in Winter Park, Florida. Holt said Ameriprise became the top choice for his practice after he learned more about the firm's suite of technology capabilities and its client-centric culture.

Holt, who grew to manage $147 million in client assets over 36 years of leading his practice, was immediately drawn to Ameriprise when he made the decision to move his practice. He found that Ameriprise's culture and values complement his dedication to client service.

Reflecting on his decision, Holt said, "The reason I moved to Ameriprise was simple: I wanted more time to work directly with my clients. Ameriprise is a longstanding leader in financial planning, and it was important for me to have unparalleled support, robust investment capabilities, and a wide-array of products that can elevate the way I serve clients to best support their unique needs."

Additionally, Holt added, "The transition to Ameriprise and the hands-on onboarding support I received was top-notch. Within days I was up and running – it couldn't have been a more streamlined and efficient process."

Holt is supported by Ameriprise Complex Director **Dylana Hopler.**

Bobbie Hageman, Ameriprise Vice President of Advisor Transitions and Acquisition Program Management, and her team worked closely with Holt's team during his transition. "We are pleased to welcome Paul to Ameriprise. When advisors join our firm, we provide specialized support and create a customized transition plan leveraging the Ameriprise OnboardPro technology platform," said Hageman. "The plan with any transition is to make it as seamless as possible. We do most of the administrative heavy lifting to alleviate a lot of the pressure of moving to a new firm, which allows advisors to concentrate on servicing their clients' needs."

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.

[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.