

Advisor Chooses Ameriprise Financial for Firm's Large 'Toolbox' of Resources to Serve Clients

Russell Smith had a smooth transition from Edward Jones thanks to Ameriprise's deep expertise in facilitating advisor moves

MINNEAPOLIS – January 18, 2023 – Financial advisor **Russell Smith** recently moved his \$150-million-dollar practice to the branch channel of Ameriprise Financial, Inc (NYSE: AMP) in Downers Grove, Illinois. Smith switched firms after two decades with Edward Jones for access to more resources and products to serve his high-net-worth client base. Client service associate **Sheila Lindsay**, who has 20 years of experience in the industry, and Ameriprise complex director **Jay Hubbard** support Smith's practice.

"I desired a platform that could meet the needs of my high-net-worth clients and accelerate my growth aspirations," said Smith. "After thorough research, I was impressed with Ameriprise's intense focus on championing the advisor-client relationship. The firm has a large toolbox full of intuitive technology and a wide variety of products to support the way I want to work with my clients."

Reflecting on the process of moving his business, Smith said, "I worked hard to build my practice, and so it was crucial that my next firm could provide an efficient transition. Ameriprise has extensive experience in facilitating advisor moves, and so my clients were able to make a smooth transition."

Bobbie Hageman, Ameriprise Vice President of Advisor Transitions and Acquisition Program Management, and her team worked closely with Smith's team on the transition. "Every advisor's transition to Ameriprise is highly customized. In the case of Russell and his team, we combined our firm's digital transition platform with a dedicated team of transition specialists to support and guide them along the way. This structure allowed Russell to concentrate on what he does best: serving his clients."

Smith is deeply involved in his community, including roles with the local Chamber of Commerce, Kiwanis Club, Veteran's Memorial, and Village Trustee in Burr Ridge, Illinois

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](https://ameriprise.com), we have been helping people feel confident about their financial future for more than 125 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.



"I wanted to partner with a firm that could support my high net-worth clients – and the way I want to work"

RUSSELL SMITH, Financial Advisor
Downers Grove, IL
Joined from Edward Jones

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 Q3 2022 Earnings Release.

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