

# Ameriprise Hires \$367M Morgan Stanley Fathers/Sons Team

By **Joyce Blay**

**A**DVISORS JOHN FALLDIN AND JIM MATTSON, and their sons Joe Falldin and James Mattson, operating as The Falldin-Mattson Group, have joined the Ameriprise Financial employee channel with \$367 million in client assets, the company recently announced.

The Edina, Minn.-based team, which also includes registered client service associate Abby Dority, was formerly with Morgan Stanley.

The advisors were reportedly looking for a firm with strong values, national brand recognition and a proven track record of helping advisors like themselves grow their businesses the way they wanted. For this team, growth meant establishing a family practice and having the resources and support to bring in more business organically and via practice acquisitions, according to John Falldin, an industry veteran with 37 years of experience.

“Jim and I are proud to work alongside our sons,” John Falldin said in a press release. “We have big goals as a team for how we want to continue serving our clients and work with more families. Having access to state-of-the-art financial planning, succession planning and marketing capabilities at Ameriprise will help take our practice to the next level.”

Jim Mattson is a 34-year industry veteran, his son James has six years of experience, and Joe Falldin is new to the industry.

John Falldin said the team evaluated firms for more than a year before selecting Ameriprise. Making the decision to move during a pandemic with attendant financial and health hazards was difficult, but ultimately, they decided the timing was right.



Jim Mattson, Abby Dority, John Falldin, and James Mattson of the Falldin-Mattson team join Ameriprise in Minnesota.

“Our transition, which has been all virtual, is going well,” said John Falldin. “Our clients are pleased with our move to Ameriprise because of their positive reputation and robust digital capabilities that allow them to see progress toward their goals in real time.”

Founded in 1894 by John Tappan, Ameriprise Financial is a diversified financial services company and bank holding company incorporated in Delaware and headquartered in Minneapolis. **FA**

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