

NYLIFE Team That Managed \$114M Joins Ameriprise

By **Joyce Blay**

THE ADVISORS OF OAK BRIDGE FINANCIAL have joined the Ameriprise franchise channel, the companies announced in a news release.

The team, comprised of advisors Peter C. Goudeau Jr., his son Peter Goudeau III, Larry Boyd and Andrew Brereton, was formerly with NYLIFE Securities, where they managed \$114 million in client assets.

The advisors, who work with a national clientele that includes refinery workers, company executives, attorneys and professional athletes, moved to Ameriprise on July 1.

Goudeau Jr. said in the news release that he and his team evaluated firms in the independent space for four years before choosing Ameriprise. What differentiated Ameriprise, he said, was the firm’s national brand recognition among clients, expertise in helping advisors grow their businesses and intuitive integrated technology platform.

“Technology at Ameriprise is smartly designed to give clients access to their account information, statements, goals and goal progress in a matter of clicks,” he said in the news release. “Client-facing tools, like the Ameriprise mobile app, e-signature, and account aggregation tool Total View, are reducing friction in our business, freeing up time for us to focus on serving our clients and building our business.”

He said that Oak Bridge Financial chose to affiliate as franchise advisors because they were looking for a balance of independence and support to grow their practice both organically and through practice acquisitions.

“It sounds counterintuitive, but in the midst of the Covid-19 pandemic all the pieces came together for us to move to Ameriprise,” he said in the release. “The ongoing market chaos, while unnerving at times, will also create opportunities for us to expand our team. We’re excited to leverage Ameriprise’s practice acquisition team to explore the possibilities of growing our practice in a way that aligns with our goals.”



Peter Goudeau Jr.



Larry Boyd



Peter Goudeau III



Andrew Brereton

Brian Mora, Ameriprise senior franchise field vice president, said in a statement, “Oak Bridge Financial has big goals for how they want to continue growing and helping more clients live brilliant, financially-secure lives. ... I’m proud the team decided to partner with Ameriprise. We have deep expertise in helping advisors raise the bar in their practices by creating efficiencies and focusing on the business elements that will return the most value.”

Ameriprise Financial, Inc. is a diversified financial services company and bank holding company incorporated in Delaware and headquartered in Minneapolis. **FA**

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