NEWS RELEASE

21 Ameriprise Financial Advisors Recognized on Barron's "2024 Top 100 Independent Financial Advisors" Ranking

2024-09-23

Ameriprise advisors represent over 20% of the list, which recognizes top advisors across the industry for their practice scale, client service, and professionalism

MINNEAPOLIS--(BUSINESS WIRE)-- Ameriprise Financial (NYSE: AMP) today announced that 21 of the firm's financial advisors have been recognized on Barron's "Top 100 Independent Financial Advisors" ranking. Each year, Barron's identifies the nation's top 100 independent advisors based on various factors that contribute to success in the business. Advisors are ranked on the volume of client assets overseen by their teams, revenues generated for their firms, and the quality of their practices including a high level of ethical standards.

"Congratulations to the Ameriprise advisors named by Barron's," said Bill Williams , Executive Vice President and President of the Ameriprise Independent Advisors channel. "It's an honor to have witnessed the number of Ameriprise advisors on this list grow year after year and we celebrate their success. These advisors continuously raise the bar on the overall experience and value they bring to clients. We're proud to partner with them and support their growth through innovative technology, impactful coaching programs and robust wealth management capabilities."

Ameriprise advisors recognized on the Barron's "2024 Top 100 Independent Financial Advisors" ranking:

- Joel Bird , CFP ® , BFA™, CRPC™, APMA™, CLTC ® , Private Wealth Advisor and Chief Executive Officer of Legacy

Financial Partners in Bismarck, North Dakota

- Dane Burkholder , CFP ® , ChFC ® , CRPC™, APMA™, Private Wealth Advisor and Managing Partner of Roseville Wealth Management Group in Lancaster, Pennsylvania
- AJ Jugan , CFP ® , Private Wealth Advisor and Managing Partner of Premier Wealth Partners in Pittsburgh, Pennsylvania
- Jon Kuttin , CRPC™, AAMS™, AWMA℠, CMFC™, CRPS™, APMA™, Private Wealth Advisor and Chief Executive Officer of Kuttin Wealth Management in Hauppauge, New York
- Randy Linde , CFP ® , Chief Executive Officer of APG Wealth Advisors in Renton, Washington
- Charla McIntyre Fields , MBA, CRPC™, Private Wealth Advisor of Fields Wealth Management in Hurst, Texas
- Kim Orth , CFP ® , CKA ® , Private Wealth Advisor of Orth Financial Group in Wilmington, Delaware
- Geri Pell , MBA, CFP ® , CDFA ® , Private Wealth Advisor and Chief Executive Officer of Pell Wealth Partners in Rye Brook, New York
- Darrell Pennington , CFP ® , MBA, Private Wealth Advisor and Managing Partner of Pennington Wealth Management in Houston, Texas
- Scott Tiras , CFP ® , MBA, Private Wealth Advisor and President of Tiras Wealth Management in Houston, Texas
- Dan Wilson , CFP ® , ChFC ® , CLU ® , Private Wealth Advisor of Skyeburst Wealth Management in Auburndale, Massachusetts
- Erin Scannell, CFP ® , ChFC ® , CLU ® AAMS™, Private Wealth Advisor of Heritage Wealth Advisors in Mercer Island, Washington
- Richard Miller, CFP ® , ChFC ® , Private Wealth Advisor and Chief Executive Officer of R. Miller & Associated in Wellesley, Maryland
- Jason Klein, Financial Advisor and Managing Partner of OsborneKlein in Portage, Michigan
- Susan Kim, CFP ® , APMA™, Private Wealth Advisor and Managing Partner of Kim, Hopkin & Associates in Vienna, Virginia
- Kris Kasturi, CRPC™, APMA™, Private Wealth Advisor and Co-Founder of Gratium Wealth Planning in Palm Coast, Florida
- Colin Grahl, CFP ® , APMA™, CAP ® , Private Wealth Advisor of WGG Wealth Partners in Roseville, California
- Adam Goldstein, CFP ® , ChFC ® , CLU ® , CMFC™, Private Wealth Advisor of Goldstein & Associates in Calabasas, California
- Bret Glover, CFP ® , CRPC™, AIF ® , Financial Advisor and Managing Partner of WGG Wealth Partners in Roseville, California
- Jeff Chaddock, CRPC™, APMA™, Private Wealth Advisor and Chief Executive Office of Envisage Wealth in Gahanna, Ohio
- Jeffrey Brandt, Private Wealth Advisor and Chief Executive Office of Ascendant Wealth Management Group in Des Moines, Iowa

The full ranking can be found **here** .

About Ameriprise Financial

At Ameriprise Financial, we have been helping people feel confident about their financial future for 130 years [1] . With extensive investment advice, asset management and insurance capabilities and a nationwide network of approximately 10,000 financial advisors, we have the strength and expertise to serve the full range of individual and institutional investors' financial needs.

[1] Company founded June 29, 1894

Barron's generates its rankings from a formulaic analysis of surveys answered by candidates regarding assets, revenue, and quality of practice, including an advisor's regulatory and compliance record. Certain awards include a demographic component to qualify. This award for each applicable year is based on data from the previous two calendar years and is not indicative of this advisor's/team's future performance. Neither Ameriprise Financial nor its advisors pay a fee to Barron's in exchange for the ranking or its use. Barron's is a registered trademark of Dow Jones, L.P.; all rights reserved.

Certified Financial Planner Board of Standards, Inc. (CFP Board) owns the CFP ® certification mark, the CERTIFIED FINANCIAL PLANNER™ certification mark, and the CFP ® certification mark (with plaque design) logo in the United States, which it authorizes use of by individuals who successfully complete CFP Board's initial and ongoing certification requirements.

Ameriprise Financial is not affiliated with any religion or faith-based financial advisor organization.

Ameriprise Financial Services, LLC is an Equal Opportunity Employer.

Investment products are not insured by the FDIC, NCUA or any federal agency, are not deposits or obligations of, or guaranteed by any financial institution, and involve investment risks including possible loss of principal and fluctuation in value.

Securities offered by Ameriprise Financial Services, LLC., Member FINRA and SIPC

Stephanie Siegle, Media Relations
612.671.2593

Stephanie.Siegle@ampf.com

Source: Ameriprise Financial