



NEWS RELEASE

## Advisor Practice With \$140 Million in Assets Joins Ameriprise Financial for Enhanced Client Experience and Long-Term Continuity

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Strickoff Financial Services joins The Atlantic Group, an established Ameriprise practice based in Boca Raton, Fla., as part of a long-term succession and transition plan

MINNEAPOLIS--(BUSINESS WIRE)-- Strickoff Financial Services, LLC, led by Kive Strickoff, CPA, AIF<sup>®</sup>, recently joined the branch channel of Ameriprise Financial, Inc. (NYSE:AMP) from Commonwealth Financial Network where the team managed nearly \$140 million in client assets. Strickoff, along with his long-time client service associates Rhonda Sossner and Colleen Barbato, have joined The Atlantic Group, a well-established Ameriprise financial advisory practice led by founding partners Andrew Lerner, APMA<sup>™</sup>, AWMA<sup>™</sup>, CFP<sup>®</sup>, ChFC<sup>®</sup>, and Logan Shalmi APMA<sup>™</sup> in Boca Raton, Fla.

The move reflects a deliberate decision by Strickoff to thoughtfully position his practice, and his clients, for the long term. As a solo practitioner, he sought a firm and team that shared his planning-focused, client-first philosophy while offering the scale, resources and continuity needed to support his clients well into the future.

Through the **Ameriprise External Practice Acquisition Program**, local Ameriprise field leadership worked with Strickoff to identify a practice that shared his values and service standards. Ameriprise leaders facilitated introductions with several highly qualified advisory teams, and The Atlantic Group ultimately emerged as the best fit for Strickoff, his team and the clients they serve.

"The decision to transition my practice was not one I took lightly," said Strickoff. "After meeting with local leadership

and engaging in a thoughtful evaluation process, it became clear that Ameriprise and The Atlantic Group shared my values around client care, continuity and long-term growth. The resources, culture, and people ultimately set the firm apart.”

Among the reasons Strickoff chose Ameriprise and The Atlantic Group:

- A shared commitment to putting clients first: “The Atlantic Group leads with integrity, purpose and a client-first mentality. Their focus on long-term relationships and personalized advice closely mirrors how I’ve always served my clients.”
- Depth and sophistication in financial planning: “I was drawn to the strong alignment around financial planning at both the firm and team level. The Atlantic Group’s planning-focused philosophy, supported by the sophisticated financial planning capabilities of Ameriprise, will allow me to guide my clients with even more clarity and efficiency.”
- Integrated technology: “I’ve been impressed with the technology at Ameriprise. The firm has clearly invested heavily in integrated, cutting-edge tech that helps streamline operations, reduce complexity and elevate the overall client experience.”
- Collaborative culture and long-term continuity: “I’m excited to align with such a collaborative, growth-minded team like The Atlantic Group. My clients now have an expanded network of trusted professionals with the resources and support of a strong firm behind them, and that gives me tremendous peace of mind about the future.”

“The synergies with Kive and his team were evident right away,” said Logan Shalmi. “We share a deep commitment to comprehensive planning, service excellence and doing what’s right for clients, and we’re excited to welcome Kive, Rhonda and Colleen to Ameriprise and the team.”

The Atlantic Group transitioned from Oppenheimer to Ameriprise in October 2025. Today, the practice consists of 11 financial advisors – including Lerner, Shalmi, Lance Ross, APMA<sup>®</sup>, Hector Garcia Aguilar, CFP<sup>®</sup>, AWMA<sup>®</sup>, APMA<sup>®</sup>, David S. Gordon, APMA<sup>®</sup> and Mark Zuckerman – who participated as purchasers in this recent external practice acquisition, along with nine support staff members who manage more than \$1.8 billion in combined client assets.

The team is supported locally by Ameriprise Branch Manager **Drew Granauro**, Ameriprise Complex Director **Daniel Landrau** and Ameriprise Regional Vice President **Michael Rearden**.

Ameriprise has continued to attract experienced, productive financial advisors, with approximately 1,700 joining the firm in the last 5 years.<sup>1</sup> To find out why experienced financial advisors are joining Ameriprise, visit [ameriprise.com/why](https://ameriprise.com/why).

## About the Ameriprise External Practice Acquisition Program

Whether advisors are looking to grow by acquisition, plan for succession or transition their practice, Ameriprise Financial offers comprehensive, hands-on support through a dedicated team of specialists. Advisors benefit from proven processes, deep industry experience and end-to-end guidance designed to support both business goals and client continuity.

- Growth through acquisition: The firm helps Ameriprise advisors grow by acquisition, guiding them through the process and providing financing to eligible advisors.
- Succession planning & selling a practice: Whether sunsetting or selling their practice, Ameriprise helps advisors transition in a way that makes sense for them and their business. Our succession strategy specialists help advisors find the right successor who shares their values, service standards and long-term vision for clients.

## About the Ameriprise Ultimate Advisor Partnership

The Ameriprise **Ultimate Advisor Partnership** offers a differentiated experience for advisors that helps them accelerate growth while delivering an excellent client experience. Combined with the company's culture of support and independence, the Ultimate Advisor Partnership enables advisors to scale their businesses, deepen client relationships and drive referrals for future growth.

## About Ameriprise Financial

At **Ameriprise Financial**, we have been helping people feel confident about their financial future for more than 130 years.<sup>2</sup> With extensive investment advice, global asset management capabilities and insurance solutions, and a nationwide network of more than 10,000 financial advisors, we have the strength and expertise to serve the full range of individual and institutional investors' financial needs.

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<sup>1</sup> Ameriprise Financial Q4 2025 Earnings Release.  
<sup>2</sup> Company founded June 29, 1894

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