



NEWS RELEASE

Advisor Team Joins Ameriprise for Best-in-Class Technology Capabilities

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Anthony DeAngelo says Ameriprise's client- and advisor-facing technology ecosystem will have an immediate impact, allowing capacity for growth with a continued emphasis on the client experience

MINNEAPOLIS--(BUSINESS WIRE)-- **Lionheart Wealth Management**, an advisory practice managing nearly \$200 million in client assets, joined the independent channel of Ameriprise Financial, Inc. (NYSE: AMP) from AXA Advisors in New York, New York. Financial advisor **Anthony DeAngelo** leads the team, which includes advisors **Frank D'Erasmus** and **Samuel Dicocco**, and executive assistant **Aneta Szatkowski**. The team found Ameriprise was the best fit to provide the digital experience they wanted for their clients and for the future growth of their practice.

"Ameriprise provides what we want for each client – clearly documented goals, and the solutions to help achieve them, displayed in an easy-to-access platform," said **DeAngelo**, who has over a decade of experience in the industry. "Additionally, Ameriprise has the most complete product platform, which was important to us because we value clients having access to a full breadth of solutions to meet their unique goals."

DeAngelo's team chose Ameriprise after vetting many independent firms over the last six months. In addition to supporting an elevated client experience, Ameriprise stood apart for providing flexibility to create their own team culture and expand their team to bring on new advisors and clients.

Reflecting on their future growth plans, DeAngelo said, "The integration in Ameriprise's technology platform is powerful. It will drive efficiency, freeing up my team to connect with clients even more often and acquire new

clients. And, we will have time to prioritize recruiting the right experienced advisors and individuals looking to change careers to join our practice. Once these advisors are here, the integrated system will help them create efficient workflows from day one.”

Lionheart Wealth Management was founded in 2017 and serves predominately executives and employees of large audit/consulting, financial services, big law, and publicly traded companies as clients. The team is supported by Ameriprise field vice president **Glenn Flego**.

Ameriprise has continued to attract experienced, productive advisors, with approximately 1,700 joining the firm in the last 5 years.¹ To find out why experienced financial advisors are joining Ameriprise, visit ameriprise.com/why.

About Ameriprise Financial

At Ameriprise Financial, we have been helping people feel confident about their financial future for more than 125 years. With extensive advisory, 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. For more information, or to find an Ameriprise financial advisor, visit ameriprise.com.

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¹ Ameriprise Financial 2020 10-K.

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