



NEWS RELEASE

# Advisor Team Joins Ameriprise in Search of Personalized Support and Freedom to Set Their Own Goals

2021-03-18

Advisors say Ameriprise stood out for its practice management expertise, culture, and complete product platform

Southern Indiana Advisors, a financial advisory practice of Ameriprise Financial, LLC

MINNEAPOLIS--(BUSINESS WIRE)-- **Southern Indiana Advisors**, a wealth management practice managing \$130 million in client assets, joined the independent channel of Ameriprise Financial, LLC (NYSE: AMP) from Raymond James Financial Services, Inc. in Jasper, Indiana. The team is led by financial advisors **Jeff Schneider, AAMS<sup>®</sup>, CRPC<sup>®</sup>**, **Jennifer Wilkerson**, and **Karen Lively**, and includes office assistant **Jan Kleinhelter**. The team was seeking more personalized support to reach their practice goals amid the constantly changing environment, and found Ameriprise delivered what they were looking for.

This press release features multimedia. View the full release here:

<https://www.businesswire.com/news/home/20210318005855/en/>

Southern Indiana Advisors, a financial advisory practice of Ameriprise Financial, LLC (Photo: Business Wire)

“We chose Ameriprise for their approach to supported independence,” said Wilkerson.

“We wanted the freedom to design our own practice goals and the personalized support to help us reach them. Ameriprise stood out for their practice management expertise, which will help us plan for clients’ futures as well as the future of our practice. We saw how client expectations are evolving, and we extensively researched how various

firms could help us deliver the service experience we want for clients today and tomorrow.”

The team began evaluating their options a year and a half ago and paid close attention to how firms navigated the persistent disruption caused by the COVID-19 pandemic. They were impressed with the level of care Ameriprise provided to clients and advisors.

“Jennifer, Karen, and I have 40+ years of combined experience bringing guidance and support to Main Street investors,” said Schneider. “Ameriprise fits our team culture and supports our mission of making the sometimes complicated and confusing world of investing understandable and accessible to our clients. Additionally, Ameriprise has a complete product platform, which was important to us because we value clients having access to a full breadth of financial solutions to help meet their unique investment and insurance needs.”

Schneider founded Southern Indiana Advisors in 2008. Jennifer Wilkerson joined the team in 2015 and Karen Lively joined in 2018. They are supported locally by Ameriprise senior franchise field vice president **Trish Moll**.

More than 4,300 financial advisors have joined Ameriprise since 2008.<sup>1</sup> To find out why experienced financial advisors are joining Ameriprise, visit [ameriprise.com/why](https://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](https://ameriprise.com).

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<sup>1</sup> Company data as of Q2 2020.

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Source: Ameriprise Financial