NEWS RELEASE

Advisor Team With $140 Million in Assets Joins Ameriprise Financial for Greater Client Experience, Independence and Planning Capabilities

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Jeff Flamm and Kevin Smith join Beyond Wealth Advisors, an established Ameriprise Financial practice led by financial advisor Joshua Lake

MINNEAPOLIS--(BUSINESS WIRE)-- Financial advisors Jeff Flamm and Kevin Smith recently joined the independent channel of Ameriprise Financial, Inc. (NYSE:AMP) from Key Investment Services, LLC where they managed $140 million in client assets. The duo joined an established Ameriprise practice, Beyond Wealth Advisors, a private wealth advisory practice led by financial advisor Joshua Lake CFP®, CRPC™, APMA®, with offices in areas of Cincinnati and Dayton, OH, as well as Richmond, Ind.

Flamm and Smith were seeking more ownership in their business, the opportunity to deliver a deeper financial planning experience, and a team-based environment that would elevate the service they provide to clients. As they began to explore a transition, a long-time former colleague at Beyond Wealth Advisors put them in touch with Lake – and the connection was immediate.

"From our very first conversation with Josh, it was clear that Ameriprise and Beyond Wealth Advisors offered exactly what we were looking for," said Smith. "This move provides us both the independence to run our practice the way we want and the support of an experienced, highly collaborative team and sophisticated firm that enhances the value we can provide to clients."

Flamm and Smith outlined several key reasons for making the move:

- Comprehensive Financial Planning:"We were looking for a deeper, more holistic planning approach. Ameriprise provides the robust planning tools and capabilities that fully align with how we want to help clients pursue their goals," said Flamm.
- Independence:"We wanted the resources of a large, established firm, along with autonomy and greater ownership of our business," said Smith. "Ameriprise gives us the best of both worlds – allowing us to operate independently while leveraging the firm's powerful tools, technology and support."
- Collaborative Team Environment: "We're excited to be part of such a talented and experienced team and firm," said Flamm. "We look forward to learning from our colleagues, sharing our experience and continuing to expand the value we deliver to clients."
- Long-Term Continuity: Flamm added, "As we look ahead to the long-term future of our practice, joining Beyond Wealth and Ameriprise gives us the opportunity to thoughtfully plan for continuity – including identifying the right successor when the time comes – ensuring our clients continue receiving the same high-quality service they've always known."

Both advisors highlighted the smoothness of the transition process as a key indicator that they made the right move. "The transition has gone incredibly smoothly," said Flamm. "Our clients have appreciated how seamless everything has been, which has only reinforced for us that this was the right decision."

Lake shared his confidence in the value Flamm and Smith bring to the firm and his practice. "Beyond Wealth Advisor's mission is to provide clear, personalized guidance that empowers clients to live the life they envision. Jeff and Kevin embody these values. Their commitment to meaningful advice, strong relationships, and thoughtful planning aligns perfectly with our culture," he said. "We're excited to have them on the team and confident they will make a significant impact on our clients and the continued growth of our practice at Ameriprise."

Beyond Wealth Advisors includes 11 financial advisors and 11 support staff who manage more than $1.1 billion in combined client assets. The practice is supported locally by Ameriprise Franchise Field Vice President Matthew Curtis and Ameriprise Regional Vice President Trish Moll.

Ameriprise has continued to attract experienced, productive financial 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 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[2]. 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.

[1] Ameriprise Financial Q4 2025 Earnings Release.

[2] Company founded June 29, 1894

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