



NEWS RELEASE

Advisor Team With \$150 Million in Assets Joins Ameriprise from Waddell & Reed

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The team says clients' reaction to Ameriprise has been 'overwhelmingly positive'

MINNEAPOLIS--(BUSINESS WIRE)-- **Tranquil Lakes Investment Advisors**, a wealth management practice managing \$150 million in client assets, joined the independent channel of Ameriprise Financial, LLC (NYSE: AMP) from Waddell & Reed in Madison, Wisconsin. The team consists of **Jason Hatch, AWMA[®]**, **Mark Wood, AAMS[®]** and **Frank Janowitsch, APMA[®]**, **Mary Weber, MBA**, and **Benjamin Esdaile**. After their previous firm was acquired, the team thoroughly evaluated the marketplace and found that Ameriprise had the reputation, robust support for advisors and dedicated transition team that made them feel confident in making the move.

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

<https://www.businesswire.com/news/home/20210304005902/en/>

Jason Hatch, Mark Wood and Frank Janowitsch with Tranquil Lakes Investment Advisors, a financial advisory practice of Ameriprise Financial. Photo courtesy of Tranquil Lakes.

Reflecting on the transition, Hatch said, "We were at an inflection point – our firm was

changing. We prepared clients for the potential that we would move firms, and they liked that we did our research. We looked at the marketplace and found a firm that had a solid reputation and was a good fit for our business and most importantly, our clients. And, their reaction to Ameriprise has been overwhelmingly positive. One client told me, 'Congrats, you're at a great firm and we're excited for you.'"

Tranquil Lakes evaluated many independent firms against their key criteria. They wanted to affiliate with a firm that

prioritizes the client experience, has accessible leaders, provides integrated technology, delivers capabilities for growth, and has a strong brand reputation for integrity and transparency.

“We are excited about Ameriprise, their capabilities and our potential for growth,” said Hatch, who has 15 years of experience in the industry. “We have the opportunity to do more financial planning, expand through purchasing practices, and to continue building out our client experience. We’ve appreciated the transition support to set up our practice the right way, so we can hit the ground running. Their expertise has allowed us to focus on servicing clients rather than transition activities.”

The team is supported locally by Ameriprise field vice president **Brad Sabol**. “Ameriprise offers personalized support for advisors. We care about what matters to them, and we are dedicated to delivering the experience each advisor wants for their clients. I’m thrilled to partner with Tranquil Lakes to grow their practice and help more people achieve their financial goals.”

Tranquil Lakes serves a wide variety of clients, including families, professionals, blue collar workers, Wisconsin cranberry growers, and company 401ks.

More than 4,300 financial advisors have joined Ameriprise since 2008.¹ 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 Company data as of Q2 2020.

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