



NEWS RELEASE

## Advisor Team with Nearly \$500 Million Joins Ameriprise Financial For Client-Focused Culture

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The father-son, father-daughter team joins Q5 Wealth Management, an established Ameriprise practice

MINNEAPOLIS--(BUSINESS WIRE)-- Financial advisors **Chuck Heare, Ross Heare, CFP<sup>®</sup>, Tommy Goth** and **Jennifer Goth-Castillo**, recently joined the independent channel of Ameriprise Financial, Inc. (NYSE: AMP) from UBS Financial Services, Inc. in Beaumont, Texas managing over \$480 million in client assets. The team – comprised of father-son and father-daughter duos – was formerly known as Goth Heare Wealth Management Group. They join **Q5 Wealth Management**, an established Ameriprise practice led by managing partners **Omar Bitar, Jeremy Saba, Mike Persia, Ed Persia, APMA<sup>™</sup>**, and **Brad Klein**. Q5 transitioned their practice from UBS to Ameriprise in 2024.

The two teams worked closely at UBS for many years before Q5 Wealth Management moved to Ameriprise last year. Soon after Q5's transition, the Goth Heare Wealth Management Group reached out to learn more about their move and it quickly became clear they needed to join forces at Ameriprise.

The team cited several factors that drew them to Ameriprise and Q5 Wealth Management:

- **Client-First Culture:** "We were looking for a firm and team that prioritizes clients above all else and is not encumbered by the traditional Wall Street investment bank or wirehouse culture," said Ross Heare. "At Ameriprise, the firm's client-centric philosophy, integrated technology, and depth of resources helps us truly focus on serving our clients and put their needs first."

- Freedom To Build Out Support Model: “The ability to easily employ support staff was also a big draw for us,” said Tommy Goth. “We now have the autonomy to build a team and service model that’s tailored to our clients’ needs – allowing us to deliver a more consistent and efficient client experience.”
- Shared Values: “We’ve known Omar, Jeremy, Mike, Ed and Brad for years, and we share very similar values, starting with a deep commitment to serving clients,” said Chuck Heare.

The transition to Ameriprise and Q5 is off to a strong start. “The feedback from our clients has been overwhelmingly positive,” added Jennifer Goth-Castillo. “We’re excited about the future and what we can build together at Ameriprise and Q5 Wealth Management.”

**Tiffany Barber**, client service assistant, also made the transition to Q5 with the Goth Heare Wealth Management Group.

## Growth of Q5 Wealth Management

Less than a year after joining Ameriprise with an eye towards growth, Q5 Wealth Management has expanded significantly – adding six financial advisors to the practice. In addition to the recent arrival of the Goth Heare Wealth Management Group, the team has welcomed Scott Guptill, who came on board with \$100 million in client assets from Morgan Stanley and Kurtis Bell, who joined from LPL Financial with \$25 million in client assets.

Today, Q5 Wealth Management includes 11 financial advisors and 7 support staff who manage over \$1.9 billion in client assets.

“Ameriprise has been incredibly supportive in our ambitious goals to grow our practice and ultimately bring more value to the clients we serve,” said Omar Bitar, financial advisor and managing partner of Q5 Wealth Management. “The firm’s integrated technology capabilities, vast product lineup and supportive leadership structure have made it possible for us run a thriving practice that’s centered on creating an incredible experience for both advisors and clients.”

The team is supported locally by Ameriprise Franchise Field Vice President **Logan Clipp** and Ameriprise Regional Vice President **Tres Rouquette**.

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 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.

<sup>1</sup> Ameriprise Financial Q4 2024 Earnings Release.

<sup>2</sup> Company founded June 29, 1894

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