



NEWS RELEASE

Advisor Team with Over \$525 Million in Assets Joins Ameriprise Financial for Independence and Client-Focus

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The team of Pacific Crest Planning says they are excited to be at a firm that “shares and supports our goals and aspirations for growth”

MINNEAPOLIS--(BUSINESS WIRE)-- **Pacific Crest Planning**, a wealth management practice managing over \$525 million in client assets, recently joined the independent channel of Ameriprise Financial, Inc. (NYSE: AMP) from RBC Capital Markets, LLC in Kennewick, Wash. Private wealth advisor **Ryan Sullivan CFP®**, **CLU®**, **ChFC®** leads the team, which includes private wealth advisor **Kyle Blodgett, CFP®**, financial advisors **Niles Gale** and **Landra Macy**, and four support staff members.

Pacific Crest Planning chose Ameriprise Financial for the opportunity to be independent and align with a client-focused firm. “We wanted flexibility and more autonomy in the way we run our practice and serve our clients,” said Sullivan. “Additionally, we were drawn to the client-first culture of the company and the depth of resources to help us deliver a top-notch client experience.”

It was also important for the team to join a firm that is committed to the financial planning process. “At Ameriprise, we are able to benefit from the firm’s longtime focus and expertise in comprehensive financial planning,” added Blodgett. “Here we can offer an even more robust planning experience to our clients that inspires confidence and provides clarity regarding their financial futures.”

Sullivan says his team has a growth mindset, and it’s clear that Ameriprise Financial as an organization does as well.

“We’re excited to be at a firm that shares and supports our goals and aspirations for growth.”

The team credits the company’s transition team for their successful move. “There are no words I can use to sufficiently express my gratitude for their help and professionalism,” says Sullivan. “The transition support team at Ameriprise is such an asset and certainly a competitive advantage for the firm.”

Pacific Crest Planning is supported locally by Ameriprise Franchise Field Vice President **David Call** and Ameriprise Regional Vice President **Marcus Ranger**.

Ameriprise Financial has continued to attract experienced, productive financial advisors, with 340 advisors moving their practices to Ameriprise in 2022 and 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 more confident about their financial future for more than 130 years. With extensive investment advice, asset management and insurance capabilities and a nationwide network of approximately 10,000 financial advisors², we have the strength and expertise to serve the full range of individual and institutional investors' financial needs.

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¹ Ameriprise Financial 2022 10-K.

² Ameriprise Financial Q3 2023 Earnings Release.

Ameriprise Financial Q 2022 Earnings Release

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Source: Ameriprise Financial