



NEWS RELEASE

Advisor With \$100 Million in Assets Joins Ameriprise Financial For Enhanced Client Experience and Long-Term Continuity

2025-10-13

Roy LeBlanc joins Azalea Wealth Management, an established Ameriprise practice led by Private Wealth Advisor David McKean Jr.

MINNEAPOLIS--(BUSINESS WIRE)-- Financial advisor **Roy LeBlanc** recently joined the independent channel of Ameriprise Financial, Inc. (NYSE:AMP) from Wells Fargo Clearing Services, LLC where he managed over \$100 million in client assets. He joined an established Ameriprise practice, **Azalea Wealth Management**, in Mobile, Ala., led by Private Wealth Advisor **David McKean Jr., APMA®**.

The move marks a professional reunion for LeBlanc and McKean, who worked together for several years at their previous firm. LeBlanc shared that the decision to join Ameriprise was driven by a desire to align with a firm and team that offers robust financial planning capabilities, a client-first culture and a clear path for succession.

"After nearly thirteen years at my previous firm, I was ready for a change – and because of its strong reputation and client-focused culture, Ameriprise was my top choice," said LeBlanc. "I had watched David build something truly special at Ameriprise. So, when the time came to make a move, joining him here felt like the natural next step."

LeBlanc praised the transition experience, noting the exceptional support from Azalea Wealth Management and the Ameriprise home office. "The transition was seamless. Everything we discussed was delivered, and the support I received exceeded my expectations."

“This move isn’t just about today – it’s about the future and ensuring long-term continuity for my clients,” said LeBlanc. “When the day eventually comes for me to retire, I’m confident my clients will continue to receive the same level of care and attention we’ve always provided. Knowing they’ll be in trusted hands with David and Ameriprise gives me tremendous peace of mind.”

Azalea Wealth Management includes three financial advisors and four support staff members. The practice is supported locally by Ameriprise Franchise Field Vice President **Sabrina Tacheny** 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.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 years². 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 2024 10-K.

² Company founded June 29, 1894

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