



NEWS RELEASE

Advisor With \$130 Million in Assets Joins Ameriprise Financial for Client Service Focus and Flexibility

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Financial Advisor Lance Lively says he's made large upgrades to his service model and practice with the firm's tools and capabilities

MINNEAPOLIS--(BUSINESS WIRE)-- Financial advisor **Lance Lively, AAMS™, MBA** recently joined the independent channel of Ameriprise Financial, Inc. (NYSE: AMP) from Edward Jones in Sand Springs, Oklahoma with nearly \$130 million in client assets.

"Ameriprise stood out because of their focus on helping advisors provide the best service possible to clients," shared Lively. "The outstanding technology, financial planning capabilities, investment lineup and ease of doing business at the firm have allowed us to make huge upgrades to our client service model and practice."

Lively's goal is to grow his practice and believes he can best accomplish that at Ameriprise. "We now have the flexibility to grow and add staff to our practice on our own terms," he said. "We want excellent customer service to be what differentiates us, so it's critical to be able to structure our team in a way that helps us achieve that."

Ameriprise's track record of successful advisor transitions was also a large factor in Lively decision to join the firm. "It was important for me to know I'd be supported through the transition," says Lively. "The help I've received from Ameriprise during this move has been top-notch and I couldn't have ramped up as quickly or smoothly as I have without them."

Lively is joined by Client Service Specialist **Tara Beebe**. The team is supported locally by Ameriprise franchise field

vice president **Danielle Dwyer** and Ameriprise regional vice president **Trish Moll**.

Ameriprise 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.

Ameriprise Financial cannot guarantee future financial results.

Ameriprise Financial Services, LLC is an Equal Opportunity Employer.

¹ Ameriprise Financial 2022 10-K.

² Ameriprise Financial Q3 2023 Earnings Release.

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