



NEWS RELEASE

Advisor With Over \$100 Million in Assets Joins Ameriprise to Elevate the Experience He Delivers for Clients

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Financial advisor Joe Chairez says the client-centric and supportive culture drew him to Ameriprise

MINNEAPOLIS--(BUSINESS WIRE)-- Financial advisor **Joe Chairez MBA, CFP®**, recently joined the branch channel of Ameriprise Financial, Inc. (NYSE: AMP) from J.P. Morgan Securities with \$105 million in assets in Dallas, Texas.

Reflecting on his decision to join Ameriprise, Chairez said, "I was drawn to the capabilities Ameriprise offers that will help me deliver an even greater experience to my clients. Ameriprise has an impressive track record for client satisfaction and I'm excited to tap into the power of the firm's technology and resources to take my service model to the next level."

Chairez has been impressed by the encouraging and supportive culture of the organization, his local branch team, and the vast resources to support advisor growth. "Everyone at Ameriprise is so helpful and genuine," he shared. "I am surrounded by leaders and colleagues who are always willing and able to support my personal and practice growth."

The firm's demonstrated track record of successful advisor transitions also helped seal his decision to join. "I knew Ameriprise had the expertise, dedicated resources and support to facilitate my transition well, and they certainly delivered."

Chairez is supported locally by Ameriprise Complex Director **Thomas Harris** and Ameriprise Regional Vice President **Mitchell Doren**.

Ameriprise has continued to attract experienced, productive financial advisors, with approximately 1,700 joining the firm in the last 5 years.¹ Nine out of ten advisors who joined Ameriprise in the last 5 years say the firm's technology, financial planning capabilities and ability to acquire clients is better than their previous firm.² 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 advisors³, 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.

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¹ Ameriprise Financial 2022 10-K.

² Ameriprise asked experienced advisors who moved their book of business to the firm in the last one-to-five years to compare its support, resources, and capabilities to their previous firm and state their satisfaction with their experience. The survey results identified the top ways Ameriprise stands out compared to competitors. 294 advisors responded to the "Ultimate Advisor Partnership" survey, which was conducted in November 2021.

³ Ameriprise Financial Q3 2023 Earnings Release.

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Source: Ameriprise Financial, Inc.