



NEWS RELEASE

Advisor with Over \$100 Million Assets Joins Ameriprise Financial for Financial Planning Focus and Growth Opportunities

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Advisor says his transition to Ameriprise “could not have gone better”

MINNEAPOLIS--(BUSINESS WIRE)-- Financial advisor **Bruce Kunkle**MBA, CFP®, RICP®, recently joined the branch channel of Ameriprise Financial, Inc. (NYSE: AMP) from Wells Fargo with over \$100 million in assets in Conshohocken, Pennsylvania. Kunkle joined Ameriprise for comprehensive financial solutions and growth opportunities.

“As a Certified Financial Planner, I was impressed by the firm’s focus on comprehensive planning and the resources to help advisors foster meaningful client relationships,” said Kunkle. “The wide range of tailored tools and coaching programs will help me grow organically.”

Kunkle was also drawn to the opportunities for inorganic growth with the firm’s **succession planning** and **practice acquisition** programs. “I wanted to join a firm that provides opportunities for next-generation advisors,” said Kunkle. “It’s clear that Ameriprise understands the shifting dynamics of an aging advisor force and offers programs that help advisors acquire practices from those retiring from the business.”

According to Kunkle, the transition to Ameriprise has been smooth and successful. “It could not have gone any better. The onboarding team was incredible and the regional and national support made me feel right at home,” he shared. “My clients have been overjoyed with the move to Ameriprise and are thankful to be with a firm deeply committed to their satisfaction.”

Kunkle is supported locally by Ameriprise Branch Manager **Michael Harnett**, Ameriprise Complex Director **Amber Almeida** and Ameriprise Regional Vice President **Todd Hubley**.

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 125 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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²Ameriprise Financial 2022 10-K.

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.

³Ameriprise Financial Q3 2023 Earnings Release.

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Source: Ameriprise Financial