NEWS RELEASE

Advisors Join Ameriprise for Integrated Technology and Financial Planning Capabilities

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The advisors come to Ameriprise with nearly $180 million in assets and a focus on growth

MINNEAPOLIS--(BUSINESS WIRE)-- Saxon Advisors, a wealth management practice managing nearly $180 million in client assets, recently joined the independent channel of Ameriprise Financial, Inc. (NYSE: AMP). Garry Rutledge, AIF®, Brian Bushman, CRC®, and Donald McClurg, CRPC™,who operate Saxon Advisors in Cincinnati, Ohio, moved their practice to Ameriprise from Cambridge Investment Research Inc.

When the team was looking to make a move, the integrated suite of technology and comprehensive financial planning capabilities at Ameriprise stood out.

“We wanted to deliver a superb client experience while running our business more effectively,” said Bushman. “The advanced technology ecosystem will free up more time in our day to focus on what’s most important—spending time with our clients.”

McClurg is particularly excited about the difference Ameriprise’s financial planning tools and client-facing technology will make for their clients.

He added, “With these enhanced tools and technology, our clients will have a clearer view of how they’re tracking against their financial plans. This level of clarity can help reduce anxiety, especially in rocky markets like we are in now, because clients can see exactly where they stand.”

“Our ultimate goal is to grow Saxon Advisors by bringing on more advisors and providing best-in-class service to more clients,” said Rutledge. “We believe Ameriprise is the right firm to help us do that.”

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 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 advisors[3], 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.

Investment products are not insured by the FDIC, NCUA or any federal agency, are not deposits or obligations of, or guaranteed by any financial institution, and involve investment risks including possible loss of principal and fluctuation in value.

Investment advisory products and services are made available through Ameriprise Financial Services, LLC, a registered investment adviser.

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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 2022 Earnings Release.

Allison Harries, Media Relations
612.678.7035
allison.h.harries@ampf.com

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