



NEWS RELEASE

# Advisors with \$264 Million Join Ameriprise Financial for the Firm's Client-First Culture and Cutting-Edge Technology

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Advisors Laura Burback and Kari Brown joined Alliance Financial Partners, a well-established Ameriprise team managing \$405 million led by Financial Advisor Larry Hubbard

MINNEAPOLIS--(BUSINESS WIRE)-- Today, Ameriprise Financial, Inc. (NYSE: AMP) announced that financial advisors **Laura Burback, AAMS<sup>®</sup>** and **Kari Brown, AAMS<sup>®</sup>, APMA<sup>®</sup>** joined the firm for its client-first culture and technology. The advisors operated separate practices in Casper, Wyoming at Edward Jones – Burback managed \$212 million in client assets and Brown managed \$52 million – and both chose to join **Alliance Financial Partners**, a well-established team within Ameriprise's independent channel led by financial advisor **Larry Hubbard, CEPA<sup>®</sup>, APMA<sup>®</sup>**.

## Advisor with 40 years of experience says Ameriprise is the right fit

After 40 years in the industry, Burback evaluated broker-dealers and determined that Ameriprise was the best fit after being introduced to the firm's technology, including industry-leading financial planning capabilities, extensive investment research, and client-first culture. Ameriprise also provided the opportunity for Burback and her longtime business partner **Andra Gentry** to be part of a broader team.

"Client service is my number one priority, and I quickly learned that the same is true for Larry, his team, and the Ameriprise teams supporting us," said Burback. "There's great communication from the corporate office to advisors on insights to help us serve clients, and the firm's cutting-edge technology is impressive because of the efficiency

and power it provides.”

Reflecting on her experience building her business, she said, “In the early years of my career, back in the early 1980s, I had a manager tell me I wouldn’t be successful as a financial advisor because I was a young woman. Thankfully, I believed in myself and was passionate about the opportunity to help my friends and family make financial decisions with confidence. It’s gratifying to start accounts for the fourth generation of my first clients, and to mentor the next generation of women advisors. It’s also gratifying to see how much the industry has evolved in the time since. Financial services today offers wonderful and supportive career opportunities for women and men of all backgrounds.”

## Both advisors join Ameriprise team focused on growth

Brown, who became an advisor two years ago, was also looking for more resources to serve her clients. She found that aligning with Alliance Financial Partners provided her with mentorship opportunities as well as efficiencies that create capacity for future growth. Brown joined Ameriprise and Alliance with her financial planning assistant **Jessica Wilkinson**.

“Laura, Andra, Kari, and Jessica are wonderful additions to our team because of their steadfast commitment to clients and strong reputations in their community,” said Hubbard. “We wanted to expand our footprint further into Wyoming and align with advisors who want to help their clients reach their financial goals.”

Alliance Financial Partners manages \$405 million in client assets and is headquartered in Greeley, Colorado. The team also includes financial advisors **Craig Conner, CFP<sup>®</sup>, APMA<sup>®</sup>, ChFC<sup>®</sup>, Jade Maasch, APMA<sup>®</sup>, Ben Waite, APMA<sup>®</sup>** and **Jim Glover, CFP<sup>®</sup>, AAMS<sup>®</sup>** and support staff **Carolyn Gattis, Robert Timme, and Karen Mannina**.

Ameriprise has continued to attract experienced, productive financial advisors, with approximately 1,600 joining the firm in the last 5 years.<sup>1</sup> 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.<sup>2</sup> To find out why experienced financial advisors are joining Ameriprise, visit [ameriprise.com/why](https://ameriprise.com/why).

## About Alliance Financial Partners

**Larry Hubbard, CEPA<sup>®</sup>, APMA<sup>®</sup>** is the Franchise Owner of Alliance Financial Partners, a financial advisory practice of Ameriprise Financial, headquartered in Greeley, Colorado that employs seven financial advisors and five staff members who manage \$405 million in client assets. The team received Ameriprise’s Client Experience Award in 2021 recognizing the way they consistently deliver personalized, goal-based advice and exceptional client service.

## About Ameriprise Financial

At **Ameriprise Financial**, we have been helping people feel 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, we have the strength and expertise to serve the full range of individual and institutional investors' financial needs.

Not FDIC or NCUA Insured	No Financial Institution Guarantee	May Lose Value
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<sup>1</sup> Ameriprise Financial 2021 10-K.

<sup>2</sup> 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.

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