



NEWS RELEASE

## American National Bank of Texas Moves Broker-Dealer Relationship to Ameriprise Financial for Enhanced Client Experience

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MINNEAPOLIS--(BUSINESS WIRE)-- American National Bank of Texas (ANBTX), an independently owned bank with assets over \$5 billion and more than 30 locations throughout North Texas, has transitioned its investment program to Ameriprise Financial (NYSE: AMP). ANBTX joined the Ameriprise Financial Institutions Group (AFIG) from LPL Financial with a team of six financial advisors who help clients manage over \$483 million in combined assets. The bank selected Ameriprise Financial Services, LLC as its new broker-dealer in order to enhance the experience it offers to clients with expanded capabilities, solutions, and technology.

As part of the transition, the bank formally named its investment program ANBTX Investment Services, a financial advisory practice of Ameriprise Financial Services, LLC.

“At ANBTX, we’re proud to have served our customers and our communities since 1875. Our new partnership with Ameriprise Financial is founded on our shared commitment of putting our clients—and their needs—first,” said Kathy A. Howe, Executive Vice President and Director of Wealth Management at ANBTX. “Beyond the values we share, we selected Ameriprise Financial to support our investment program because of its powerful capabilities, which we believe will enhance our ability to help our clients reach the next step in their financial journeys.”

Through Ameriprise Financial, ANBTX clients will have access to a full range of leading services and solutions including:

- Personalized advice and financial planning capabilities tailored to their individual needs.

- Robust investment products to help them achieve their financial goals.
- Digital capabilities that allow clients to connect with their financial advisors where and how they want—face-to-face, online, video or phone meetings.

Howe leads the ANBTX Investment Services group comprised of dedicated professionals committed to the goals and values of clients. The team includes financial advisors Daniel Finch, Jennifer George-Smith, Patsy Gómez, Karen Martin, Cassie Perry and EJ Pipkin; retirement plan advisor Carol Dogans; and senior vice president and program manager Cheryl Sutter.

“We’re honored that ANBTX selected Ameriprise Financial to support its growth and to build upon the strong personalized service it provides to clients in helping them reach their financial goals,” said Jay McAnelly, Group Vice President, Ameriprise Financial Institutions Group. “At Ameriprise we continuously invest in industry-leading digital capabilities, and we look forward to bringing these powerful tools, combined with our tailored advice and wide range of investment products, to ANBTX so that it can consistently deliver its exceptional experience to more clients.”

## About American National Bank of Texas

American National Bank of Texas, founded in 1875 in Terrell, Texas, is an independently owned bank with assets of over \$5 billion and with more than 30 locations throughout North Texas serving Collin, Dallas, Hunt, Johnson, Kaufman, Rockwall, Tarrant, and Van Zandt Counties. As a community bank, American National Bank of Texas offers traditional banking products and services to individuals, businesses, and municipal governments as well as individual and corporate trust, investment and estate planning services through their Wealth Management Group. ANBTX has consistently been ranked one of the Top 100 Places to Work by the Dallas Morning News. Visit American National Bank of Texas online at [www.anbtx.com](http://www.anbtx.com). Member FDIC.

## About Ameriprise Financial

At Ameriprise Financial, we have been helping people feel confident about their financial future for more than 125 years. With extensive advisory, asset management and insurance capabilities and a nationwide network of approximately 10,000 financial advisors<sup>1</sup>, we have the strength and expertise to serve the full range of individual and institutional investors' financial needs. For more information, or to find an Ameriprise financial advisor, visit [ameriprise.com](http://ameriprise.com).

Not Insured by FDIC or Any Other Government Agency

Not Bank Guaranteed

Not Bank Deposits or Obligations

May Lose Value

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<sup>1</sup> Ameriprise Financial Q4 2021 Earnings Release.

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