



NEWS RELEASE

Ameriprise Attracts Advisor with \$250 Million in Assets to its Financial Institutions Channel for Enhanced Capabilities to Serve Clients

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Amanda Hale says her clients appreciate Ameriprise’s extensive product platform and intuitive technology

MINNEAPOLIS--(BUSINESS WIRE)-- Ameriprise Financial, Inc. (NYSE: AMP) announced today that financial advisor **Amanda Hale** has moved her \$250-million practice to the firm from PNC Investments in Port Arthur, Texas. Hale chose to join Third Coast Advisors, a financial advisory practice within the Ameriprise Financial Institutions Group (AFIG), which provides advice and investment services to Third Coast Bank branches across Southeast Texas.

“Ameriprise quickly became my top choice once I saw how efficient it was to do business here,” said Hale, who has 22 years of experience in the industry. “Clients love Ameriprise’s technology because account setup and ongoing service are simple and intuitive. I love it too – particularly the mobile client app, which is smartly designed and makes it easy and efficient to interact with clients anywhere, anytime.”

“Additionally, clients appreciate how they have access to a much broader product platform at Ameriprise – ensuring that they have the right set of investments and services to achieve their goals,” Hale added.

As for the partnership with Third Coast Bank, Hale credits mutual trust for their collective success. “I’ve known several members of the bank’s leadership team for many years. We’re already reaping the benefits of our shared commitment to helping clients reach their financial dreams.”



Hale's practice includes client service associate and practice manager **Jessica Guidroz**. Hale is also the President of the Board of Directors for Family Services of Southeast Texas, an organization that strengthens and empowers families through accessible counseling services, shelter services, education, and advocacy.

Third Coast Advisors in growth mode

Third Coast Advisors launched its investment program in 2021 without any financial advisors in place. In partnership with the Ameriprise recruiting and leadership teams, the program has since brought on five experienced advisors with more than \$1 billion in assets under management. The team's significant growth is due to the longstanding relationships the advisors have with Third Coast Bank's clients, the Bank's reputation, and Ameriprise's strong offering.

"We chose Ameriprise Financial as our investment program partner because the firm's passion for personalized financial advice matches our own," said **Bart Caraway, Chairman, President and Chief Executive Officer of Third Coast Bank**. "Our growth over the past two years has allowed us to help hundreds more Texans feel more confident about their financial future."

The AFIG team offers the strength and resources of Ameriprise to help banks and credit unions enhance their client/member experience and deepen relationships with advice, financial planning, investment products, technology capabilities, advisor recruiting, coaching and support. To find out why experienced financial advisors and institutions are joining Ameriprise, visit ameriprise.com/why.

About Third Coast Bank SSB

Third Coast Bank SSB was established in March of 2008 by a group of local organizers seeking to create a relationship-oriented bank committed to personal service and community contribution. We distinguish ourselves by anticipating and exceeding the expectations of our customers, building sustainable partnerships, maintaining the highest standards of ethical business conduct, being aware of and responsive to the needs of our community, and always being mindful of the fact that customers have a choice.

Third Coast Bank is proud to be locally owned with grassroots values and an entrepreneurial spirit. Our employees are empowered to do the right thing and encouraged to make a difference in our communities. It has been said that we are the "grease in the economic engine" as we have helped numerous businesses grow and profit. Those profits allow our customers more freedom for "doing good in their communities."

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 advisors¹, 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 Q3 2022 Earnings Release.

Stephanie Siegle, Media Relations

612.671.2593

stephanie.siegle@ampf.com

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