



NEWS RELEASE

Ameriprise Financial Welcomes \$150 Million UBS Advisor Looking for Greater Support and an Empowering Culture

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Financial advisor Michael Walstien says his eyes were opened to everything Ameriprise could offer for his clients and his practice

MINNEAPOLIS--(BUSINESS WIRE)-- Financial advisor **Michael Walstien** recently joined the branch channel of Ameriprise Financial, Inc. (NYSE: AMP) from UBS Financial Services, Inc. with \$150 million in assets in Wayzata, Minn.

Walstien made the move to Ameriprise for several reasons:

- Client service support: "First and foremost, I was looking to provide an enhanced experience for my clients. Ameriprise has the support, tools, and systems to bring our client offering to the next level."
- Financial planning: "The firm's longtime focus and expertise in financial planning will allow my clients broader access to resources and comprehensive advice."
- Technology: "Ameriprise invests in technology, tools and services that make it more efficient for advisors to run their businesses, while offering a streamlined digital experience for clients."
- Culture: "I love the culture here at Ameriprise and in our branch office. It's truly a collaborative, team atmosphere where everyone is empowered to excel in their careers."

Walstien did his due diligence with firms across the industry as he started thinking about a transition. Through this process, it became clear Ameriprise is one of the best in the business when it comes to advisor transitions. "Ameriprise said they had the expertise, dedicated resources, and supportive culture to facilitate my transition well,

and they did not disappoint,” says Walstien. “The move is going extraordinarily well, and my clients have been extremely supportive and pleased with the change.”

Walstien is joined by client service associate **Kaeli Williams** . They are supported locally by Ameriprise Complex Director **Adam Lukens** and Ameriprise Regional Vice President **Mitch Doren** .

Ameriprise has continued to attract experienced, productive financial advisors, with more than 400 advisors moving their practices to Ameriprise in 2023 and approximately 1,700 joining the firm in the last 5 years. ¹ To find out why experienced financial advisors are joining Ameriprise, visit ameriprise.com/why .

About the Ameriprise Ultimate Advisor Partnership

The Ameriprise **Ultimate Advisor Partnership** offers a differentiated experience for advisors that helps them accelerate growth while delivering an excellent client experience. Combined with the company’s culture of support and independence, the Ultimate Advisor Partnership enables advisors to scale their businesses, deepen client relationships and drive referrals for future growth.

About Ameriprise Financial

At **Ameriprise Financial** , we have been helping people feel confident about their financial future for 130 years. With extensive investment advice, asset management and insurance capabilities and a nationwide network of approximately 10,000 financial advisors ² , 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.

Securities offered by Ameriprise Financial Services, LLC. Member FINRA and SIPC.

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¹ Ameriprise Financial 2023 10-K.

² Ameriprise Financial Q1 2024 Earnings Release.

Alison Mueller, Media Relations

612-678-7183

Alison.g.mueller@ampf.com

Source: Ameriprise Financial, Inc.