



NEWS RELEASE

Ameriprise Financial Welcomes Advisors from Morgan Stanley and Wells Fargo with \$259 Million in Assets

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The advisors were attracted to the level of care and support Ameriprise provides amid uncertainty and market volatility

MINNEAPOLIS--(BUSINESS WIRE)-- Two teams of financial advisors with \$259 million in combined client assets have joined the employee channel of Ameriprise Financial (NYSE: AMP). Jeffery Davis joined from Morgan Stanley in Plano, Texas. Separately, Glen Wilk joined from Wells Fargo in Duluth, Georgia. Both teams were looking for a firm that is strategically focused on supporting the advisor-client relationship and can help them deliver even more value to clients even during challenging circumstances.

Jeffery Davis, who manages \$155 million in client assets, spent the last two years considering all options – other wirehouses, regionals, and independents – and decided to move on May 8 after watching how firms initially responded to the COVID-19 pandemic. He chose Ameriprise because he was impressed by how the firm is keeping clients' needs front and center and is equipping advisors to deliver a compelling client experience completely virtually.

"Moving during a pandemic presents its challenges, but ultimately it was the right decision for my practice," said Davis, who has 28 years of experience in the industry. "Leaders here prioritize and support the relationship advisors have with clients; I've already seen the support as we navigate the many events impacting the financial markets and industry right now. Clients are home and reachable, and I have the time and flexibility to set up my practice the way I want to."

Davis' team also includes his longstanding registered client service associate Monica Smith. Ameriprise complex director Jonathan Frigo provides local leadership support.

Advisor Finds Firm Supports Advising Multigenerational Client Families

Glen Wilk, who manages \$104 million in client assets, was also attracted to how Ameriprise treats and supports advisors and clients.

"The reason I joined Ameriprise is quite simple: the firm cares deeply for clients and advisors," said Wilk, who has 32 years of experience in the industry. "One example is that here I am able to advise clients with a variety of account sizes. I work with two and three generations of many families; It's valuable to those families that I'm able to provide advice to the youngest members that are just starting out in their careers."

Scott Masters, Ameriprise branch manager, supports Wilk. "Glen chose Ameriprise because of our intense focus on enabling advisors to create a fantastic client experience for all of their clients that can be delivered in any market environment," said Masters.

Wilk operates under the name GRWilk & Associates Wealth Advisors. His practice includes financial advisor Renea Eldridge.

More than 4,000 financial advisors have joined Ameriprise since 2008.¹ To find out why experienced financial advisors are joining Ameriprise, visit ameriprise.com/careers.

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, 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.

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¹ Company data as of August 2019.

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