



NEWS RELEASE

Ameriprise Financial Welcomes Two Advisors with Over \$150 Million in Assets From Commonwealth Financial

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Advisors cite personalized support and growth-focused resources at Ameriprise as key factors in their decisions to join

MINNEAPOLIS--(BUSINESS WIRE)-- Ameriprise Financial, Inc. (NYSE: AMP) recently welcomed two financial advisors to its independent channel with more than \$150 million in combined client assets from Commonwealth Financial Network. **Chris Theis, CKA[®], FPQP[®]**, based in Millsboro, Delaware, and **Michael Thomas**, based in Hamilton, Montana, separately made the decision to join Ameriprise following Commonwealth's acquisition by LPL Financial. The additions underscore Ameriprise's continued momentum in attracting talented advisors amid industry transitions.

Theis joins Ameriprise for greater support and boutique feel

Theis, who manages over \$100 million in client assets, was looking for a firm that offered strong support and a personalized experience. He found Ameriprise to be the best fit.

"I chose Ameriprise because it offers the boutique feel I was looking for, backed by the depth of resources needed to support my practice," said Theis. "The firm's client-centric value proposition also closely aligns with my own approach to serving clients."

"The strength of the Ameriprise leadership team also stood out immediately. From the first meeting, it was clear

they were experienced, responsive and genuinely invested in helping advisors succeed,” Thisis added.

Thisis is joined by Client Service Associate and Operations Lead **Kristi Osborn**. The team is supported locally by Ameriprise Franchise Field Vice President **Athena McGuire** and Ameriprise Regional Vice President **Thomas North**.

Practice management and integrated technology draws Thomas to Ameriprise

Separately, Thomas joins Ameriprise with over \$50 million in client assets. After evaluating 15 firms, Thomas found Ameriprise to be unmatched in professionalism, practice management and technology.

“I had reached a point where I needed help managing the growth of my practice,” said Thomas. “Ameriprise’s practice management team has real experience and a proven track record. Their technology is integrated and client-focused, which means less time on paperwork and more time serving my clients.”

“Looking ahead, I’m excited to grow my business through practice acquisitions and by hiring junior advisors,” added Thomas. “While I’ve always been a solo advisor, in just a short time at Ameriprise, I’ve already hired an administrative assistant and expanded my office, thanks to the support and guidance from the firm’s transition and practice management teams.”

“While transitions can be challenging, joining Ameriprise has proven to be the best decision for my practice,” said Thomas.

Thomas is supported locally by Ameriprise Franchise Field Vice President **David Call** and Ameriprise Regional Vice President **Marcus Ranger**.

“Chris and Michael are great examples of the kind of advisors who thrive at Ameriprise – those looking for a firm that combines personalized support with the scale and resources to grow their practices,” said **Brian Mora**, Senior Vice President of Experienced Advisor Recruiting at Ameriprise. “Our value proposition is built around helping advisors accelerate growth, deepen client relationships and leverage a robust infrastructure backed by leaders who are deeply invested in their success. We’re proud to welcome them to the team.”

Ameriprise has continued to attract experienced, productive financial advisors, with 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 more than 130 years². With extensive investment advice, global asset management capabilities and insurance solutions, and a nationwide network of more than 10,000 financial advisors, we have the strength and expertise to serve the full range of individual and institutional investors' financial needs.

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¹ Ameriprise Financial Q4 2024 Earnings Release.

² Company founded June 29, 1894

Ameriprise Financial cannot guarantee future financial results.

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