



NEWS RELEASE

Ameriprise Financial Welcomes Two Teams from Wells Fargo and UBS with \$286 Million in Assets

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The advisors have felt the strength of Ameriprise as they've moved to virtual meetings and supported clients through market volatility with high-touch technology, research and insights

MINNEAPOLIS--(BUSINESS WIRE)-- Two teams with \$286 million in combined assets under management have joined the employee channel of Ameriprise Financial (NYSE: AMP). Father-son team Robert Arthur Bonwell Sr., CRPC® and Robert Arthur Bonwell Jr. joined from Wells Fargo in Charleston, West Virginia. Separately, Jim Buzgo, CFP® joined from UBS in Boston, Massachusetts. Both teams were looking for more support to serve their clients through comprehensive financial planning.

This press release features multimedia. View the full release here:

<https://www.businesswire.com/news/home/20200408005712/en/>

Robert Arthur Bonwell Sr., Kellie Keeling, Robert Arthur Bonwell Jr., Ameriprise financial advisors. Photo courtesy of Ameriprise Financial.

The Bonwells, who manage \$149 million in client assets, evaluated more than 15 firms before

deciding to join Ameriprise. They were attracted to the firm's client-centric culture, ability to provide personalized advice to multi-generational families, and the fact that the firm established a new office for them in Charleston. Since they joined earlier in the year, the team has also experienced the way in which Ameriprise has mobilized quickly and effectively to serve clients virtually amid the COVID-19 pandemic.

"We are impressed by the culture and capabilities at Ameriprise," said Bonwell Jr., who has 26 years of experience in

the industry. "The company treats clients and advisors like family. We've felt the strength and support of the firm even more in the last few weeks. Ameriprise helped us pivot smoothly to virtual meetings and they've equipped us with great technology, market research and expertise to guide our clients through this uncertain period. Our clients feel very well supported, and so do we as a team."

Bonwell Sr., who has 55 years of experience, added, "We like how Ameriprise supports financial planning for the entire family. I've served many clients for 40-50 years, and it's rewarding to help them teach their kids and grandkids about investing. Particularly in an environment like we're in now, financial literacy is incredibly important."

Their team also includes Kellie Keeling, registered client service associate, who has served their clients for 34 years. Ameriprise complex director Scott Turner provides local leadership support.

Advisor Finds Firm Invested in Delivering Value to Clients

Jim Buzgo, who manages \$137 million in client assets, was attracted to Ameriprise's strong financial planning capabilities and resources to help communicate the value of personalized advice to clients.

Jeff Montieth, Ameriprise Recruiting Director, helped recruit Buzgo to Ameriprise. "Jim wanted a firm that would partner with him in providing meaningful value to clients, and he found that in Ameriprise. We're excited to have his team on board with us. The last few weeks have reinforced the need for financial advice and the personal connections that advisors like Jim have with their clients."

Buzgo's team also includes registered client service associate Drew London, AWMA. The team is supported by Ameriprise complex director David Shnitzer.

More than 4,000 financial advisors have joined Ameriprise since 2008.¹ To find out why experienced financial advisors are joining Ameriprise, visit [joinameriprise.com](https://www.joinameriprise.com).

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](https://www.ameriprise.com).

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¹ Company data as of August 2019.

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Stephanie Siegle, Media Relations

612.671.2593

stephanie.siegle@ampf.com

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