



NEWS RELEASE

# Ameriprise's Inclusive Community of Advisors Draws Team with More Than \$330 Million in Client Assets

2022-10-10

Cate Grinney and her team have access to the firm's "vast resources" to grow their practice and serve their clients' needs

MINNEAPOLIS--(BUSINESS WIRE)-- Financial advisor **Cate Grinney, CFP®**, **ChFC®** recently joined the independent channel of Ameriprise Financial, Inc. (NYSE: AMP) from Edward Jones in Faribault, Minnesota with \$331 million in client assets. Grinney was attracted to Ameriprise's commitment to supporting women advisors, deep expertise in financial planning, and vast resources to grow her practice and meet her clients' specific goals.

Financial advisor Cate Grinney, CFP®, ChFC® recently joined the independent channel of Ameriprise Financial, Inc. in Faribault, Minnesota. Photo courtesy of Cate Grinney.

Grinney conducted extensive due diligence before moving firms, looking for one with an inclusive client-first culture, robust financial planning capabilities, a wide array of products,

and support to build out her team. She discovered that Ameriprise met her criteria after she was invited to attend the firm's annual 2022 Women's Advisor Summit, where she met many members of senior leadership and other women advisors.

"Ameriprise has developed an impressive community for women advisors. The women's event was inspiring, with so many top peers sharing good ideas for how we can better serve our clients," said **Grinney**, who has 24 years of experience in the industry. "I'm energized by the opportunity to form a team practice, which will help us grow and serve clients well while also providing a clear succession plan to benefit their futures for decades. I started my career as an advisor in a team setting because I worked in my father's practice for 13 years before his retirement.

Ameriprise's vast resources to support team building will allow me to mentor and develop the rest of my team in a similar inclusive setting."

"We are truly delighted to welcome Cate and her clients to the Ameriprise family," said **Timari Robison, Ameriprise National Women's Recruiting Director**. "Ameriprise has deeply invested in the capabilities advisors need to grow their practices and help their clients achieve their biggest dreams. We're excited to get to work helping Cate and her team harness the power of our resources and expertise to take their business to the next level."

Grinney's team also includes financial advisor **Kailee Davis, MBA, RICP®**, and support staff **Beth Sammon** and **Bridgette Hallcock**. The team, which operates under the name Cate Grinney & Kailee Davis Group, is supported by Ameriprise franchise field vice president **Marcus Ranger**.

Earlier this year, Cate Grinney was named to Forbes "2022 America's Top Women Wealth Advisors Best-in-State" list<sup>1</sup>, which recognizes the industry's top women advisors based on several factors, including levels of ethical standards, professionalism, and success in the business.

Ameriprise has continued to attract experienced, productive financial advisors, with approximately 1,600 joining the firm in the last 5 years.<sup>2</sup> Nine out of ten advisors who joined Ameriprise say the firm's technology, financial planning capabilities and ability to acquire clients is better than their previous firm.<sup>3</sup> To find out why experienced financial advisors are joining Ameriprise, visit [ameriprise.com/why](https://ameriprise.com/why).

## 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 advisors<sup>4</sup>, we have the strength and expertise to serve the full range of individual and institutional investors' financial needs.

Certified Financial Planner Board of Standards Inc. owns the certification marks CFP®, CERTIFIED FINANCIAL PLANNER™ and federally registered CFP (with flame design) in the U.S., which it awards to individuals who successfully complete CFP Board's initial and ongoing certification requirements.

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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.

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<sup>1</sup> Source: Forbes, “America’s Top Women Wealth Advisors Best-in-State,” Feb. 4, 2022. The Forbes Top Women, Best-in-State Women and Best-in-State Wealth Advisor rankings are developed by SHOOK Research and are created using an algorithm that includes both qualitative (in-person, virtual and telephone due diligence meetings; client impact; industry experience; review of best practices and compliance records; and firm nominations) and quantitative (assets under management and revenue generated for their firms) data. Certain awards include a demographic component to qualify. Investment performance is not a criterion because client objectives and risk tolerances vary, and advisors rarely have audited performance reports. These rankings are based on the opinions of SHOOK Research, LLC, are not indicative of future performance or representative of any one client’s experience and are based on data from the previous calendar year. Forbes magazine and SHOOK Research do not receive compensation in exchange for placement on the ranking. For more information: [www.SHOOKresearch.com](http://www.SHOOKresearch.com). SHOOK is a registered trademark of SHOOK Research, LLC.

<sup>2</sup> Ameriprise Financial 2021 10-K.

<sup>3</sup> Ameriprise asked experienced advisors who moved their book of business to the firm in the last one-to-five years to compare its support, resources, and capabilities to their previous firm and state their satisfaction with their experience. The survey results identified the top ways Ameriprise stands out compared to competitors. 294 advisors responded to the “Ultimate Advisor Partnership” survey, which was conducted in November 2021.

<sup>4</sup> Ameriprise Financial Q2 2022 Earnings Release.

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