



NEWS RELEASE

Compelling Digital Client Experience Draws Advisor Team to Ameriprise Financial

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Former NYLIFE team excited to leverage 'smartly designed' client-facing technology to keep focus on clients and building practice

MINNEAPOLIS--(BUSINESS WIRE)-- A team of financial advisors recently joined the franchise channel of Ameriprise Financial Inc. (NYSE: AMP) from NYLIFE Securities with \$114 million in client assets. The team, called Oak Bridge Financial, includes Peter C. Goudeau Jr., LUTCF, CLU[®], ChFC[®], RICP[®], his son Peter Goudeau III, CFP[®], Larry Boyd, MBA, LUTCF, and Andrew Brereton. The advisors evaluated firms in the independent space for four years before choosing Ameriprise. What differentiated Ameriprise was the firm's national brand recognition among clients, expertise in helping advisors grow their businesses and intuitive integrated technology platform.

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

<https://www.businesswire.com/news/home/20200812005631/en/>

Oak Bridge Financial, Ameriprise Financial. In photo from left to right: Peter C. Goudeau Jr., Larry Boyd, Andrew Brereton, Peter Goudeau III (Photo courtesy of Oak Bridge Financial.)

"Technology at Ameriprise is smartly designed to give clients access to their account

information, statements, goals and goal progress in a matter of clicks," said Peter Goudeau Jr. "Client-facing tools, like the Ameriprise mobile app, e-signature, and account aggregation tool Total View, are reducing friction in our business, freeing up time for us to focus on serving our clients and building our business."

Oak Bridge Financial chose to affiliate as franchise advisors because they were looking for a balance of

independence and support to grow their practice both organically and through practice acquisitions. They carefully considered the implications of moving amid market disruption and felt confident the timing was right.

“It sounds counterintuitive, but in the midst of the COVID-19 pandemic all the pieces came together for us to move to Ameriprise,” said Goudeau Jr. “The ongoing market chaos, while unnerving at times, will also create opportunities for us to expand our team. We’re excited to leverage Ameriprise’s practice acquisition team to explore the possibilities of growing our practice in a way that aligns with our goals.”

Brian Mora, Ameriprise senior franchise field vice president, supports the team. “Oak Bridge Financial has big goals for how they want to continue growing and helping more clients live brilliant, financially-secure lives,” said Mora. “I’m proud the team decided to partner with Ameriprise. We have deep expertise in helping advisors raise the bar in their practices by creating efficiencies and focusing on the business elements that will return the most value.”

The team, who are based in Houston, Texas, work with a variety of clients throughout the U.S., including refinery workers, company executives, attorneys and professional athletes. The advisors moved on July 1, 2020.

More than 4,300 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 Q2 2020.

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