



NEWS RELEASE

# Elite Team Managing \$1.5 Billion in Assets Joins Ameriprise Financial for Sophisticated Resources to Take Their Practice to the Next Level

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The team of five financial advisors say their high-net-worth clients will benefit from Ameriprise's innovative and fully integrated digital capabilities

MINNEAPOLIS--(BUSINESS WIRE)-- **Q5 Wealth Management**, a financial advisory team managing \$1.5 billion in client assets in Beaumont and Houston, Texas, recently joined the independent channel of Ameriprise Financial, Inc. (NYSE: AMP) from UBS Financial Services, Inc. Financial advisors **Omar Bitar, Jeremy Saba, Mike Persia, Ed Persia, and Brad Klein** conducted an extensive search for a new broker-dealer and chose Ameriprise for the firm's robust resources to elevate their high-net-worth clients' experience and significantly scale their practice. Specifically, the advisors were energized by Ameriprise's innovative and fully integrated digital capabilities that will make it more efficient to consistently exceed clients' expectations.

Reflecting on the move, **Mike Persia** said, "Clients are the core of everything we do, and they trust us to provide advice that propels them to reach their unique goals in life. Our team continually evaluates the way we're doing business to ensure we're delivering them the highest value. We saw an opportunity with Ameriprise to enhance our client offering and better position our practice for future growth."

Q5 Wealth Management serves high-net-worth clients across the United States. The team specializes in advising on complex financial situations for individuals planning for retirement, families and business owners. "It's our job as advisors to make it as easy as possible for clients to manage their financial lives in a comprehensive way," **Jeremy**

**Saba** added. “Ameriprise has leading capabilities that create efficiencies for clients and our team, as well as a sophisticated wealth management platform equipped with the products and services our clients want and need.”

The team chose to join Ameriprise’s independent channel because it offered the right balance of tenured support from leadership and flexibility to run their practice their way.

“We’re excited to welcome Q5 Wealth Management to our Ameriprise network,” said Ameriprise Field Vice President **Logan Clipp** . “Ameriprise is very thoughtful about the advisors we choose to partner with because we put significant time and resources into helping each one grow and serve clients exceptionally well. Omar, Jeremy, Mike, Ed, and Brad exemplify what it means to run a growth-focused, client-centric practice.”

Ameriprise Regional Vice President **Tres Rouquette** also supports the team.

The team includes their supporting staff, Investment Specialists **Kevin Wagner** and **Ashley Carter** , Client Service Managers **Sherri Thompson** , **Brandy Head** and **Taryn King** , and Client Concierge **Dena McNeil**.

Ameriprise has continued to attract experienced, productive financial advisors, with more than 400 advisors moving their practices to Ameriprise in 2023 and approximately 1,700 joining the firm in the last 5 years. <sup>1</sup> To find out why experienced financial advisors are joining Ameriprise, visit [ameriprise.com/why](https://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 130 years. With extensive investment advice, asset management and insurance capabilities and a nationwide network of approximately 10,000 financial advisors <sup>2</sup> , we have the strength and expertise to serve the full range of individual and institutional investors' financial needs.

Ameriprise Financial cannot guarantee future financial results.

Ameriprise Financial Services, LLC is an Equal Opportunity Employer.

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> Ameriprise Financial 2023 10-K.

<sup>2</sup> Ameriprise Financial Q2 2024 Earnings Release.

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