



NEWS RELEASE

## Entrepreneurial Culture, Financial Planning Focus, and Robust Transition Support Draw \$120-Million Team to Ameriprise

2021-04-15

MINNEAPOLIS--(BUSINESS WIRE)-- Today Ameriprise Financial, Inc. (NYSE: AMP) announced that **Ark Wealth Management**, a financial advisory practice managing \$120 million in client assets, has joined its independent channel from First Command Financial Planning in Tacoma, Washington. Financial advisors **Chris McCulloch, CFP®** and **Wes Niblack, CFP®, ChFC®** lead the team, and are joined by support staff **Malinda Hall, Emily Kleppen, and Erin Watlington**. The team was looking to ensure they're providing the best service to clients and found that Ameriprise could help them take their capabilities to the next level. The advisors highlighted four qualities of Ameriprise that stood out to them most in comparison to other firms:

1. **Ability to be an independent business owner.** "While we strongly considered starting our own Registered Investment Advisor (RIA), we decided that structure wasn't the right fit for us," said Niblack. "We wanted a firm that would provide compliance best practices as well as support to grow, and still give us the opportunity to own our own business."
2. **Client-centric culture.** "We made this decision based on what's best for our clients," said McCulloch. "We saw that Ameriprise shares our client-centric philosophy and passion for delivering financial plans that show clients the investment and saving roadmap to reaching their goals."
3. **Focus on financial planning and growth.** "With moving to Ameriprise, we are able to benefit from the firm's longtime focus and expertise in financial planning, while maintaining the independence we need to serve our clients the way we want to," said Niblack.
4. **End-to-end transition support.** "Ameriprise said they had the expertise, dedicated resources, and supportive

culture to facilitate our transition well, and they delivered,” said McCulloch. “Making a move can be risky, and we wanted a team that would help us retain clients and get us set up for growth quickly. The firm provided a dedicated transition team that is high touch, responsive and effective in helping us set up our business.”

McCulloch and Niblack are supported locally by Ameriprise field vice president **George Varones**.

Ameriprise has continued to attract experienced, productive advisors, with 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 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://ameriprise.com).

Ameriprise Financial Services, LLC is an Equal Opportunity Employer.

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<sup>1</sup> Ameriprise Financial 2020 10-K.

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Stephanie Siegle, Media Relations

612.671.2593

[stephanie.siegle@ampf.com](mailto:stephanie.siegle@ampf.com)

Source: Ameriprise Financial, Inc.