NEWS RELEASE

Experienced Advisory Team With $160 Million in Assets Joins Ameriprise Financial for Enhanced Client Experience and Advanced Capabilities

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The father-son team joins the branch channel of Ameriprise from Thrivent Investment Management

MINNEAPOLIS--(BUSINESS WIRE)-- Pattern Wealth, a private wealth advisory practice, recently joined the branch channel of Ameriprise Financial, Inc. (NYSE: AMP) from Thrivent Investment Management, Inc. with $160 million in client assets. The practice, located in Wayzata, Minn., is led by private wealth advisor Jeremy Jackson and includes his father, financial advisor Dave Jackson, and client service associate Erika Holland.

The team, which brings decades of combined industry experience, chose to join Ameriprise to enhance their client experience and align with a firm that supports long-term growth through advanced capabilities and a strong national brand.

“We’ve always been committed to helping our clients navigate retirement planning, insurance, and investment decisions with care and precision,” said Jeremy Jackson. “As we looked to the future, it was important to find a firm that could help us deliver even more, through a broader set of tools, a proven growth platform, and a brand our clients recognize and trust. Ameriprise stood out on all fronts.”

Jackson also emphasized the firm’s client-focused culture and operational support as key differentiators. “Ameriprise provides the right combination of personalized support, operational efficiency, and modern AI and technology capabilities to help us grow intentionally,” he said. “The firm’s integrated platform allows us to deliver more comprehensive advice while spending more time focused on what matters most: our clients. We're energized by the platform Ameriprise has built for the future, one that brings together robust investment solutions, meaningful advice, and personalized strategies with seamless digital capabilities. It positions us to continue evolving alongside our clients' needs."

"The transition has been smooth, and clients have been enthusiastic about what this move means for them," Jackson added. "They're excited about the expanded opportunities and the enhanced experience we're able to provide."

Pattern Wealth is supported locally by Ameriprise Complex Director Adam Lukens and Ameriprise Regional Vice President Mitch Doren.

Ameriprise has continued to attract experienced, productive financial advisors, with approximately 1,700 joining the firm in the last 5 years.[1] To find out why experienced financial advisors are joining Ameriprise, visit **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 more than 130 years[2]. With extensive investment advice, global asset management capabilities and insurance solutions, and a nationwide network of more than 10,000 financial advisors, we have the strength and expertise to serve the full range of individual and institutional investors' financial needs.

[1] Ameriprise Financial Q4 2025 Earnings Release.

[2] Company founded June 29, 1894

Ameriprise Financial cannot guarantee future financial results.

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