



NEWS RELEASE

Experienced Advisory Team With \$160 Million in Assets Joins Ameriprise Financial for Innovative Technology, Advisory Program and Culture

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Lee Winters III and Chris McClure join the branch channel of Ameriprise from Wells Fargo Clearing Services

MINNEAPOLIS--(BUSINESS WIRE)-- Financial advisors **Lee Winters III** and **Chris McClure** recently joined the branch channel of Ameriprise Financial, Inc. (NYSE: AMP) from Wells Fargo Clearing Services, LLC in Columbia S.C., with \$160 million in client assets. The advisors, located in Columbia, S.C., are joined by client service associate **Darragh James**.

While Winters and McClure were not actively considering a transition, a trusted mentor's move to Ameriprise prompted them to take a closer look at the firm. What began as a conversation quickly became a clear opportunity to enhance the experience they provide to clients and position their practice for future growth.

"As we evaluated the technology platform, culture and resources available at Ameriprise, it became clear the firm offered an opportunity to take our client experience to the next level," said McClure. "Ameriprise has built an exceptional culture centered on serving clients. We saw better technology, greater efficiencies and more time to focus on helping clients align their portfolios with their goals. Ultimately, we felt Ameriprise was the best place for our clients and for the future of our practice."

The team cited several key factors in their decision to join Ameriprise:

- **Technology and AI Capabilities:** “We were highly impressed by Ameriprise’s technology platform and thoughtful integration of AI tools across the business,” said Winters. “Everything, from the CRM system to the client-facing capabilities, is designed to create a more seamless experience for both advisors and clients.”
- **Ameriprise® Signature Wealth Program™:** “Signature Wealth stood out as a significant differentiator,” said McClure. “The program offers a modern and streamlined advisory approach that we believe will enhance the value we deliver to clients while creating efficiencies that allow us to spend more time strengthening relationships and growing our practice.”
- **Collaborative, Client-First Culture:** “One of the things that resonated most with us was the culture,” said Winters. “There is a strong spirit of collaboration across the firm, and people genuinely care about helping advisors succeed and delivering meaningful value to clients. We wanted to be part of that environment.”

“The transition process has gone smoothly, and our clients have responded very positively to the firm’s technology and digital capabilities,” said Winters. “We’re excited to continue deepening relationships with existing clients, expand our reach in the community and grow our practice with the support of Ameriprise.”

Winters and McClure are joined by client service associate **Darragh James**. They are supported locally by Ameriprise Branch Manager **Tor Bennstrom** and Ameriprise Regional Vice President **Michael Rearden**.

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 years². 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 2025 10-K

² Company founded June 29, 1894

Company released June 22, 2026.

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