



NEWS RELEASE

Experienced Advisory Team With \$470 Million in Assets Joins Ameriprise Financial for Long-Term Growth and Client-Focused Culture

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Sher Jeshiva Group joins the branch channel of Ameriprise from Wells Fargo Clearing Services

MINNEAPOLIS--(BUSINESS WIRE)-- **Sher Jeshiva Group**, a financial advisory practice, recently joined the branch channel of Ameriprise Financial, Inc. (NYSE: AMP) from Wells Fargo Clearing Services, LLC with \$470 million in client assets. The practice, located in Melville, N.Y. and Naples, Fla., is led by financial advisors **Glen Sher, CRPC™**, **AAMS®** and **Michael Jeshiva, CRPC™** and includes financial advisor **Philip Basile** and registered client service associate **Kathryn Acer-Richard**.

Looking to build on their success, the team chose a firm whose culture, technology and advisor support model would help them elevate the client experience while accelerating future growth.

"As we evaluated where we wanted to build the next chapter of our practice, Ameriprise stood apart," said **Sher**. "We were impressed with the firm's technology and found it superior to anything we've experienced in the industry, particularly in how efficiently we can now serve our clients. Above all, we wanted to align with a firm that shares our unwavering commitment to clients. That shared philosophy made Ameriprise the clear choice."

"We're grateful for the trust our clients have placed in us over the years, and this move is a commitment to their future as much as our own," said **Jeshiva**. "Ameriprise has sophisticated financial and estate planning capabilities, deep resources and a level of support that allows us to focus on what matters most: helping our clients navigate important financial decisions with confidence. More than 90% of our clients have already committed to making the

transition with us, which reinforces our confidence in this decision.”

"Glen, Michael, Philip and Kathryn have built a highly respected practice with a strong reputation for putting clients first," said **Aaron Wolson, Ameriprise Branch Manager**. "Their growth mindset, deep client relationships and commitment to exceptional service make Sher Jeshiva Group a terrific fit for Ameriprise. We're excited to welcome the team and look forward to supporting their continued success and growth in the Long Island market and beyond."

Sher Jeshiva Group is supported locally by Ameriprise Branch Manager **Aaron Wolson**, Ameriprise Complex Director **Kevin Peters** and Ameriprise Regional Vice President **Todd Hubley**.

Ameriprise has continued to attract experienced, productive financial advisors, with approximately 1,700 joining the firm in the last 5 years¹. 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

Ameriprise Financial cannot guarantee future financial results.

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