



NEWS RELEASE

Experienced, Female-Led Team With More Than \$300 Million in Assets Joins Ameriprise Financial for Greater Flexibility, Independence, and Support

2025-10-01

Ameriprise welcomes Kendall Wealth Management, led by Private Wealth Advisor Kiley Kendall, from Edward Jones

MINNEAPOLIS--(BUSINESS WIRE)-- Private wealth advisory practice, **Kendall Wealth Management**, recently joined the independent channel of Ameriprise Financial, Inc. (NYSE: AMP) from Edward Jones with more than \$300 million in assets. The family-run practice, based in New Philadelphia, Ohio, is led by Private Wealth Advisor **Kiley Kendall CFP®**, **AFFP®**, and **AAMS®**, and includes financial advisors **Mitch Kendall CFP®**, **CEPA®**, and **AAMS®** and **Kyle Kendall** – her husband and son, respectively.

Kiley Kendall shared that while they weren't actively seeking a change, a conversation with an Ameriprise leader sparked a deeper exploration into what the firm had to offer. "We realized it was time to take the next step in our growth journey," said Kendall. "Ameriprise offers independence, a wealth of resources, and flexibility that better align with our commitment to putting clients first, supporting our growth – all while staying true to the values that define our practice."

Kendall cited three key reasons for the move:

- Flexibility to serve clients on their terms: "Ameriprise empowers us to tailor strategies to each client's goals and complexities. Every client is different, and Ameriprise gives us the freedom to meet them where they are, whether they're emerging investors or high-net-worth clients. We can now offer more personalized, efficient,

and scalable solutions that reflect the unique needs of each individual and family we serve.”

- Independence with strength behind it: “We wanted the resources of a large, established firm, without compromising the autonomy of our practice. Ameriprise gives us the best of both worlds – allowing us to operate independently while leveraging the firm’s powerful tools, technology and support to elevate the experience and service we provide to clients.”
- The credibility of a trusted brand: “Ameriprise is a name people know and trust. That reputation provides our clients with an added layer of confidence, knowing they are supported by a firm with a long-standing commitment to stability and excellence.”

The team is excited about the future, including opportunities to deepen client relationships, expand strategic partnerships in their local community, and leverage Ameriprise’s integrated technology and planning tools. “Our practice is built on relationships,” Kendall added. “We guide families through every stage of life, and now we have even better resources to support multi-generational planning.”

Kendall Wealth Management provides comprehensive advice to clients to help them achieve the goals they have for themselves and their families. The practice includes Senior Operations Coordinator **Jennifer Stewart** and Client Service Specialist **Alexis Shaw**. They are supported locally by Ameriprise Franchise Field Vice President **Andrew Johnson** and Ameriprise Regional Vice President **Jon Jackson**.

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 Q4 2024 Earnings Release.

² Company founded June 29, 1894

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