



NEWS RELEASE

Experienced Private Wealth Practice with More Than \$370 Million in Assets Joins Ameriprise Financial to Expand Planning Capabilities and Enhance Client Experience

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Steinmetz Jackson Wealth Management Group joins the branch channel of Ameriprise from Janney Montgomery Scott

MINNEAPOLIS--(BUSINESS WIRE)-- **Steinmetz Jackson Wealth Management Group**, a private wealth advisory practice, recently joined the branch channel of Ameriprise Financial, Inc. (NYSE: AMP) from Janney Montgomery Scott, LLC with more than \$370 million in client assets. The practice, located in Fort Lauderdale, Fla., is led by private wealth advisor **Kenneth Steinmetz, CRPC™** and financial advisor **James Jackson**, and includes registered client service associate **Daniel Tila-Cohen** and client service coordinator **Stephanie Elie**.

The team joined Ameriprise to expand its planning-centric approach with access to sophisticated financial planning resources and an integrated technology platform designed to help deliver an even higher level of personalized service to clients.

"Everything we do on behalf of our clients starts and ends with financial planning," said Jackson. "Ameriprise stood out because of its sophisticated planning tools and dedicated resources, which helps us ensure every client has a personalized financial plan focused on achieving what matters most to them and their families."

In evaluating their next chapter, the team was also drawn to Ameriprise's investments in technology and its ability

to streamline and strengthen the client and advisor experience.

“We were also drawn to Ameriprise’s fully integrated technology and AI platform and look forward to leveraging it to serve our clients even more efficiently and effectively,” said Steinmetz. “The combination of financial planning capabilities, leading technology and dedicated support gives us confidence that we’re in the right place to serve our clients at an even higher level than ever before.”

“We’re energized and excited by what the future holds for our practice at Ameriprise,” added Jackson.

Steinmetz Jackson Wealth Management Group is supported locally by Ameriprise Branch Manager **Dan Landrau**, Ameriprise Complex Director **Michael Rearden** and Ameriprise Regional Vice President **Jamie Frisone**.

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

Ameriprise Financial cannot guarantee future financial results.

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