NEWS RELEASE

Experienced Team With $120 Million in Assets Joins Ameriprise Financial for Enhanced Client Experience and Operational Efficiency

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Ameriprise welcomes Loveday Caruso Wealth Management Group from LPL Financial

MINNEAPOLIS--(BUSINESS WIRE)-- Financial advisory practice Loveday Caruso Wealth Management Group recently joined the independent channel of Ameriprise Financial, Inc. (NYSE: AMP) from LPL Financial with $120 million in assets. The practice, based in Littleton, Colo., is led by private wealth advisor Sean Loveday, ChFC®, CLU®, and includes financial advisor Sarah Caruso and administrative assistant Lori O'Halloran.

The team's decision to join Ameriprise was driven by their commitment to enhancing the client experience and improving operational efficiency. Loveday outlined several key reasons for making the move:

- Client-Centered Technology and Experience: "We chose Ameriprise for its transparency and the comprehensive experience it delivers to our clients. The firm's technology puts their entire financial picture at their fingertips while offering flexibility in how they connect with us. That accessibility is the cornerstone of our practice."
- Practice Management Efficiency: "Another important factor was the ability to manage our entire practice, from investments to insurance, in a more efficient and informed way. We now have access to deeper insights and resources that allow us to manage portfolios with greater confidence and communicate that information clearly to our clients."
- Home Office Support:"The home office has provided exceptional support every step of the way. From transition through ongoing service, our questions are answered promptly and, most importantly, accurately.

> Beyond that, we've received invaluable guidance to help grow our practice. We're surrounded by a team of professionals who bring expertise in investments, marketing, retirement planning and more than a dozen other areas – all dedicated to strengthening our business."

Looking ahead, the team is excited about the opportunities Ameriprise provides. "We are incredibly excited about how we will be able to grow our business and integrate client events and engagement," said Caruso. "The feedback from clients has been phenomenal. They love the ease of accessing information and the seamless way they can communicate and do business with us here."

Loveday Caruso Wealth Management Group provides comprehensive advice to clients to help them achieve the goals they have for themselves and their families. The practice is supported locally by Ameriprise Franchise Field Vice President Danielle Dwyer and Ameriprise Regional Vice President Trish Moll.

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 2024 Earnings Release.

[2] Company founded June 29, 1894

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