



NEWS RELEASE

Experienced Team With Over \$110 Million in Assets Joins Ameriprise Financial For Client-First Culture, Technology and Robust Solutions

2025-10-16

Ameriprise welcomes JMOD Financial Services, led by financial advisor Joe Kelly, from LPL Financial

MINNEAPOLIS--(BUSINESS WIRE)-- Financial advisory practice **JMOD Financial Services** recently joined the independent channel of Ameriprise Financial, Inc. (NYSE: AMP) from LPL Financial with over \$110 million in assets. The practice is led by financial advisor **Joe Kelly** and includes financial advisors **Frank Del Busto, CFP®**, and **Dave Fedrizzi, CFP®, ChFC®, CLU®, RICP®**. The team has offices in Florida and New York, with Kelly and Del Busto based in Miami, and Fedrizzi in Rochester, New York.

Kelly shared several key reasons why the team chose to make the move to Ameriprise:

- Trusted brand and client-first culture: "Ameriprise has been helping clients plan for their financial futures for more than 130 years, and that legacy matters to us and our clients. Their strong name recognition and reputation for integrity give our clients confidence. Importantly, Ameriprise shares our belief that strong, personalized relationships are the foundation of this business."
- Advanced technology to enhance client experience: "Ameriprise has made substantial investments in technology that will help us operate efficiently and serve our clients more effectively. From streamlined workflows to intuitive client-facing tools, the platform will help us deliver a truly modern, personalized and elevated client experience. Our clients are already recognizing the impact and their feedback has been overwhelmingly positive."

- Robust investment platform: “We’ve built our practice around an evidence-based investment philosophy rooted in research and a deep understanding of market dynamics. Ameriprise not only supports our approach but enhances it with the resources of their Investment Research Group and a powerful brokerage platform. We now have access to tools and oversight that will help us refine asset allocation and deliver even greater value to our clients.”

“We’re energized by the opportunity to grow our practice at Ameriprise. This move will allow us to expand the scope of our offerings and deepen the relationships we’ve built with our clients,” said Kelly. “With the strength of Ameriprise’s platform behind us, we’re well-positioned to take our service to the next level.”

JMOD Financial Services 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 **Sabrina Tacheny** and Ameriprise Regional Vice President **Tres Rouquette**.

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 Q4 2024 Earnings Release.

² Company founded June 29, 1894

Ameriprise Financial cannot guarantee future financial results.



Ameriprise Financial Services, LLC is an Equal Opportunity Employer.

Certified Financial Planner Board of Standards Center for Financial Planning, Inc. owns and licenses the certification marks CFP[®], CERTIFIED FINANCIAL PLANNER[®], and CFP[®] (with plaque design) in the United States to Certified Financial Planner Board of Standards, Inc., which authorizes individuals who successfully complete the organization's initial and ongoing certification requirements to use the certification marks.

Investment products are not insured by the FDIC, NCUA or any federal agency, are not deposits or obligations of, or guaranteed by any financial institution, and involve investment risks including possible loss of principal and fluctuation in value.

Investment advisory products and services are made available through Ameriprise Financial Services, LLC, a registered investment adviser.

Securities offered by Ameriprise Financial Services, LLC. Member FINRA and SIPC.

©2025 Ameriprise Financial, Inc. All rights reserved.

Allison Harries, Media Relations

612.678.7035

allison.h.harries@ampf.com

Source: Ameriprise Financial