



NEWS RELEASE

Financial Advisor with More Than \$120 Million in Assets Joins Ameriprise to Elevate the Experience She Provides to Clients

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Karen DeBaker found Ameriprise to have the resources and capabilities she needs to serve clients more comprehensively

MINNEAPOLIS--(BUSINESS WIRE)-- Ameriprise Financial, Inc. (NYSE: AMP) today announced that financial advisor Karen DeBaker, CFP[®], joined a well-established independent Ameriprise practice, **Threshold Financial Partners**. The team is based in De Pere, Wisconsin, and led by financial advisor **Carey Somerville**. DeBaker brings 10 years of experience as a financial advisor, most recently with Raymond James, and more than \$120 million in client assets.

Reflecting on her move, DeBaker said, "I considered several broker-dealers, but Ameriprise and the team at Threshold Financial Partners were a cut above the rest. I felt a great sense of ease after meeting with the team. We share an unwavering commitment to put clients at the forefront of everything we do. Ameriprise offers unparalleled support and resources that will help elevate the way I serve clients."

DeBaker says her clients' reactions have been very positive. "Ameriprise has an impressive track record for client satisfaction – something I've witnessed first-hand throughout the transition. The firm also provides extensive product solutions and financial planning capabilities, as well as leading technology resources – all of which will help my clients reach their goals."

The team is supported locally by Ameriprise franchise field vice president **Brad Sabol** and Ameriprise regional

vice president **Michael Lawson** .

“We are thrilled to welcome Karen to Ameriprise,” said Carey Somerville, financial advisor at Threshold Financial Partners. “Her steadfast values and ability to connect with clients will undoubtedly enhance our practice. I’m excited to see what we can accomplish together.”

Ameriprise has continued to attract experienced, productive financial advisors, with more than 400 advisors moving their practices to Ameriprise in 2023 and 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 130 years. With extensive investment advice, asset management and insurance capabilities and a nationwide network of approximately 10,000 financial advisors ² , we have the strength and expertise to serve the full range of individual and institutional investors' financial needs.

Ameriprise Financial cannot guarantee future financial results.

Ameriprise Financial Services, LLC is an Equal Opportunity Employer.

Certified Financial Planner Board of Standards, Inc. (CFP Board) owns the CFP® certification mark, the CERTIFIED FINANCIAL PLANNER™ certification mark, and the CFP® certification mark (with plaque design) logo in the United States, which it authorizes use of by individuals who successfully complete CFP Board’s initial and ongoing certification requirements.

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¹ Ameriprise Financial 2023 10-K.

² Ameriprise Financial Q1 2024 Earnings Release.

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