



NEWS RELEASE

Financial Advisors Reflect on Successful Transition to Ameriprise Despite Uncertain Times

2020-08-05

Six months after moving their practice, former Stifel advisors say Ameriprise's dedicated support and seamless technology facilitated a smooth transition

MINNEAPOLIS--(BUSINESS WIRE)-- Financial advisors Donald Henriquez III and Scott Cirelli joined the employee channel of Ameriprise Financial (NYSE: AMP) in Florham Park, N.J. after spending almost nine years at Stifel Financial Corp. The advisors, who manage \$162 million in client assets, moved to Ameriprise in January 2020. They credit the leadership support and integrated technology platform at Ameriprise for helping them smoothly transition their practice while providing a superior client experience, even in the midst of the disruption caused by the COVID-19 pandemic.

This press release features multimedia. View the full release here:

<https://www.businesswire.com/news/home/20200805005083/en/>

Henriquez Cirelli Group, Ameriprise Financial. From left to right: Scott Cirelli, Donald Henriquez III, Christal Generoso. (Photo: Henriquez Cirelli Group)

Reflecting on the last six months, Donald Henriquez III said, "Ameriprise delivered on all their

promises. Local leaders and executives were on our side every step of the way. They assigned us four additional people to help with the transition so we could quickly move our practice in the new all-virtual environment. The support team's expertise was critical to setting up our business the way we wanted to."

"It's a big responsibility to guide people financially through a pandemic," added Scott Cirelli. "The decisions clients

make today can really impact their life in the future. We used Ameriprise's technology to seamlessly collaborate virtually with clients. Clients were able to see their goals, assets, financial plans and possible scenarios in real-time, giving them confidence to stay invested when the headlines were heavy."

Henriquez and Cirelli evaluated many companies before selecting Ameriprise. They joined Ameriprise because of the firm's longstanding commitment and deep expertise in serving clients through comprehensive financial planning. They serve a variety of clients, with a focus on advising multigenerational families and local small business owners in the Indian and Asian communities.

Henriquez III has 18 years of experience advising clients; Cirelli has 13 years. The advisors operate under the name Henriquez Cirelli Group. Their team also includes registered client service associate Christal Generoso. They are supported locally by Ameriprise complex director Joshua Marchal and Ameriprise associate branch manager Frank Gonnella.

More than 4,000 financial advisors have joined Ameriprise since 2008.¹ To find out why experienced financial advisors are joining Ameriprise, visit ameriprise.com/careers.

About Ameriprise Financial

At Ameriprise Financial, we have been helping people feel confident about their financial future for more than 125 years. With extensive advisory, asset management and insurance capabilities and a nationwide network of approximately 10,000 financial advisors, we have the strength and expertise to serve the full range of individual and institutional investors' financial needs. For more information, or to find an Ameriprise financial advisor, visit ameriprise.com.

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¹ Company data as of August 2019.

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Source: Ameriprise Financial