



NEWS RELEASE

Financial Advisors Seeking Independence and Support Join Ameriprise to Take Their \$282-Million-Dollar Practice to the Next Level

2020-08-25

Advisors say Ameriprise's "technology has already proven its worth" amid the pandemic

MINNEAPOLIS--(BUSINESS WIRE)-- Carolinas Wealth Management, a team of financial advisors managing \$282 million in client assets, joined the franchise channel of Ameriprise Financial (NYSE: AMP) from Voya Financial Advisors. The team is led by 25-year veteran advisors **Sam Head, CEP[®]** and **David Monckton, CFP[®]** and 8-year advisor **Michael Fusco, CRPC[®]**. The advisors chose Ameriprise because the firm offered the right balance of independence and support, and continually invests in technology that saves time for both clients and their team.

"It's a big responsibility to care for clients' financial futures, especially amid a pandemic," said **Sam Head**. "We take that responsibility very seriously and needed more technology and support to deliver what we feel is our best service to clients. Ameriprise's technology has already proven its worth. My team is able to collaborate with clients to create financial plans in real time and publish plans to the secure website so clients can track their progress anytime, anywhere."

Carolinas Wealth Management started evaluating firms five years ago before choosing Ameriprise. They strongly considered joining a Registered Investment Advisor (RIA). Ultimately, the advisors were convinced that Ameriprise provided the independence they wanted and the deep expertise and support they needed.

"Technology is changing by the day," Head added. "It's a huge benefit to have Ameriprise's advanced technology platform, which is designed with advisors in mind, as well as their dedicated support teams who are helping us

make the most of all the tools at our fingertips. Now, we can spend time providing more value to our clients instead of researching new tools.”

Head and Monckton were college roommates at Clemson University and became business partners when they entered the wealth management industry in 1995. Carolinas Wealth Management also includes 18-year practice manager **Lauryn Harbour**, 8-year client relationship manager **Kayleigh McAllister**, and **James Bryon**, who recently joined as a client service specialist. The team is supported locally by Ameriprise franchise field vice president **Michael Barker**.

Carolinas Wealth Management has two office locations in Seneca and Myrtle Beach, South Carolina.

More than 4,300 financial advisors have joined Ameriprise since 2008.¹ To find out why experienced financial advisors are joining Ameriprise, visit ameriprise.com/why.

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 Q2 2020.

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Stephanie Siegle, Media Relations

612.671.2593

stephanie.siegle@ampf.com

Source: Ameriprise Financial