



NEWS RELEASE

## Growth Resources Attract Family Practice with \$165 Million in Assets to Ameriprise Financial

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The Coastal Group aspires to grow their business with the help of Ameriprise's capabilities and coaching programs

MINNEAPOLIS--(BUSINESS WIRE)-- **The Coastal Group**, a wealth management practice managing \$165 million in client assets out of two offices in Florida and Connecticut, recently joined the branch channel of Ameriprise Financial, Inc. (NYSE: AMP) from RBC Capital Markets. The team was founded by Managing Director **Marilyn Neckes, CIMA<sup>®</sup>, CRPS<sup>®</sup>, AAMS<sup>®</sup>** and includes her sons, Financial Advisors **Kyle Zingone**

The Coastal Group, from left to right: Helen Juskus, Scott Zingone, Marilyn Neckes, Kyle Zingone. The Coastal Group joined Ameriprise Financial. (Photo: Business Wire)

**AAMS<sup>®</sup>** and **Scott Zingone, CFP<sup>®</sup>, AAMS<sup>®</sup>** and Client Service Associate **Helen Juskus**. As they considered where to move their practice, the advisors decided the growth resources offered by Ameriprise – notably the firm's

financial planning platform and coaching programs – would best help them increase their revenue in the coming years.

**Neckes**, who has 38 years of experience serving clients, said about the move, "Ameriprise supports the way we want to grow, which includes maintaining two office locations in Connecticut and Florida, so we can continue to provide the comprehensive advice our clients expect from us. I feel confident that our clients are going to be taken care of for decades to come because my team has robust capabilities and support at their fingertips."

**Scott Zingone** added, "The reason we moved firms is about growth. We need more sophisticated tools and support to continue the exponential growth we've achieved over the last few years through strong client referrals.

The leadership support and coaching programs Ameriprise provides is impressive – we have access to experts across the firm who are dedicated to helping us grow and service more clients.”

Ameriprise Complex Director **Stacy Thomson**, who supports the team along with Ameriprise Complex Director **Dan Landrau**, said, “We’re passionate about helping Ameriprise advisors grow by developing the tools and coaching they need to bring their client experience to the next level. Marilyn, Kyle, and Scott have the full power of our nationally-branded firm behind them, and we’re excited to help them achieve their ambitious growth goal.”

The Coastal Group serves a wide variety of clients across many generations and U.S. states through comprehensive financial planning, including high net worth individuals as well as female clients who are in transition due to divorce or widowhood. Their average client has \$1-10 million in investable assets and is interested in building a legacy through wealth to leave their family.

Ameriprise has continued to attract experienced, productive financial advisors, with approximately 1,600 joining the firm in the last 5 years.<sup>1</sup> Nine out of ten advisors who joined Ameriprise say the firm’s technology, financial planning capabilities and ability to acquire clients is better than their previous firm.<sup>2</sup> To find out why experienced financial advisors are joining Ameriprise, visit [ameriprise.com/why](http://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<sup>3</sup>, we have the strength and expertise to serve the full range of individual and institutional investors' financial needs.

Not FDIC or NCUA Insured	No Financial Institution Guarantee	May Lose Value
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Certified Financial Planner Board of Standards Inc. owns the certification marks CFP<sup>®</sup>, CERTIFIED FINANCIAL PLANNER<sup>™</sup> and federally registered CFP (with flame design) in the U.S., which it awards to individuals who successfully complete CFP Board’s initial and ongoing certification requirements.

Ameriprise Financial cannot guarantee future financial results.

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<sup>1</sup> Ameriprise Financial 2021 10-K.

<sup>2</sup> Ameriprise asked experienced advisors who moved their book of business to the firm in the last one-to-five years to compare its support, resources, and capabilities to their previous firm and state their satisfaction with their experience. The survey results identified the top ways Ameriprise stands out compared to competitors. 294 advisors responded to the “Ultimate Advisor Partnership” survey, which was conducted in November 2021.

<sup>3</sup> Ameriprise Financial Q1 2022 Earnings Release.

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