



NEWS RELEASE

## High-Touch Support and Leading Technology Capabilities Bring Four Advisors to Ameriprise

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Former Morgan Stanley and UBS advisors with \$295 million in combined assets were attracted to Ameriprise's resources for client service

MINNEAPOLIS--(BUSINESS WIRE)-- Ameriprise Financial, Inc. (NYSE: AMP) recently added four advisors to its employee channel with \$295 million in combined client assets. **Ross Perkins** joined from UBS and separately **Thomas Rodman, Maureen Cioppi-Grill, and Paul Teufel** of Rodman, Grill & Associates joined Ameriprise from Morgan Stanley. The advisors found that Ameriprise offered them high-touch support and industry-leading technology capabilities to deliver superior service to clients.

**UBS Advisor moves to Ameriprise to take advantage of the firm's support approach Perkins,** who joined Ameriprise in Carmel, Indiana from UBS, knew it was a big decision to make a move but decided now was the time. "I wanted a place I felt I could spend the rest of my career at, and Ameriprise felt like that firm. I now have a support system in place that allows me to integrate new technology into my practice," he said.

Perkins is supported by Ameriprise branch manager **Jeff Hodges**. "We are excited to have Ross join our office. We have a strong, dynamic team supporting him to make a smooth transition, he's thrilled that the firm's capabilities are making a meaningful difference in his practice," **said Hodges**. Perkins has \$135 in assets under management.

### **Advisors from Morgan Stanley find more capabilities and efficiency at Ameriprise**

"We knew Ameriprise was the right firm for us because of their longstanding commitment to clients and reliable technology capabilities that are critical as we're meeting with more clients virtually due to the pandemic," said

**Rodman.** “With Ameriprise’s technology, we’ve been able to be more efficient with our time while maintaining the strong client relationships that we’ve had for decades.”

“We are thrilled with the wealth management and financial planning tools here. Ameriprise’s platform is more sophisticated and has the capabilities to help us meet our clients’ needs,” added **Cioppi-Grill.**

Rodman, Grill & Associates is located in Conshohocken, Pennsylvania and manages \$160 million in assets under management. They are supported by Ameriprise branch manager **Mike Hartnett.**

More than 4,300 financial advisors have joined Ameriprise since 2008.<sup>1</sup> To find out why experienced financial advisors are joining Ameriprise, visit **[ameriprise.com/why](https://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](https://ameriprise.com)**.

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<sup>1</sup> Company data as of Q2 2020.

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