



NEWS RELEASE

Julie Wallace Moves Her \$100 Million Practice to Ameriprise Financial to Embrace Client-First Culture and Operational Excellence

2024-04-30

Wallace says Ameriprise “offers a more robust financial planning experience to clients with less prep time behind the scenes”

MINNEAPOLIS--(BUSINESS WIRE)-- Financial advisor **Julie Wallace** recently joined the independent channel of Ameriprise Financial, Inc. (NYSE: AMP) from Wells Fargo Clearing Services, LLC in Petaluma, California with over \$100 million in client assets.

The primary reason Wallace moved to Ameriprise was simple: She wanted more time to work directly with clients and help them reach their financial goals and dreams. “With support from Ameriprise, I can offer a more robust financial planning experience to my clients with less prep time behind the scenes because of all the integrated technology and tools the firm offers,” she explained. “It’s a game changer.”

“Fostering deep relationships with clients and putting their needs first is most important to me. So, when I saw how the firm shares my client-centric philosophy, it all felt right,” said Wallace. “I’m excited about the future growth of my practice at Ameriprise and look forward to helping even more people reach their financial goals.”

Wallace is joined by paraplanner and administrative assistant **Marion Wagner**. The team is supported locally by Ameriprise franchise field vice president **Dean McGill** and Ameriprise regional vice president **Marcus Ranger**.

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 Ameriprise Financial

At **Ameriprise Financial**, we have been helping people feel more 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 advisors², 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.

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¹ Ameriprise Financial 2023 10-K.

² Ameriprise Financial Q1 2024 Earnings Release.

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Source: Ameriprise Financial, Inc.