



NEWS RELEASE

Minnesota Team with \$250 Million Joins Ameriprise to Provide “Best-in-Class Experience” for Clients

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Within their first month at Ameriprise, the team has retained nearly all their clients and acquired new ones

MINNEAPOLIS--(BUSINESS WIRE)-- **Christensen Wealth Advisory Group**, a wealth management practice managing in excess of \$250 million in client assets in Edina, Minnesota, joined the branch channel of Ameriprise Financial, Inc. (NYSE: AMP) from Wells Fargo. Private Wealth Advisor **Jeremy Christensen** leads the team, which includes financial advisors **Bruce Olson** and **Anthony Tsakakis**, and registered client service associate **Cheryl Larsen**. The team evaluated the marketplace for more than two years before deciding on Ameriprise, which they chose for its extensive client experience, financial planning, and practice management capabilities.

Christensen Wealth Advisory Group, a wealth management practice in Edina, Minnesota, joined the branch channel of Ameriprise Financial, Inc. (NYSE: AMP) from Wells Fargo. (Photo courtesy of Christensen Wealth Advisory Group.)

The team has already seen a positive benefit from moving to Ameriprise. Within the first month, they retained the

majority of their assets by servicing and deepening relationships with their loyal clients and acquiring new clients who are excited about their relationship with Ameriprise.

Reflecting on the transition, Christensen said, “We appreciate the opportunity to partner with the branch’s leadership and various support teams at Ameriprise to offer the best experience for our clients. The firm delivered what we were looking for, which is a harmonious environment that allows us to do business with clients the way we want to and has extensive support and resources to help us be successful.”

Christensen Wealth Advisory Group evaluated many firms against their key criteria and found Ameriprise to be the best fit. They wanted to affiliate with a firm with solid values, strong brand recognition, robust financial planning capabilities, and a wide investment platform. The team also values the practice management tools and systems to create efficiencies.

The team appreciated that Ameriprise is headquartered in nearby Minneapolis. “We are off to an unbelievable beginning due to the tremendous loyalty we have with our clients, and we’re excited about the future,” said Christensen.

The team serves a wide variety of clients in Minnesota and across the U.S., many of whom have been with them for 20 years or more. They are supported by branch manager **Adam Lukens**.

Ameriprise has continued to attract experienced, productive advisors, with 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 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.

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¹ Ameriprise Financial 2020 10-K.

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