



NEWS RELEASE

Next-Gen Advisor with More Than \$120 Million in Assets Joins Ameriprise Financial for Technology and Growth Opportunities

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Colin Gates joins The Atlantic Group, a growing \$2 billion Ameriprise practice led by next-generation advisors in Boca Raton, Fla.

MINNEAPOLIS--(BUSINESS WIRE)-- Financial advisor **Colin Gates, CPWA®** recently joined the branch channel of Ameriprise Financial, Inc. (NYSE:AMP) from Merrill Lynch, Pierce, Fenner & Smith Inc. where he managed more than \$120 million in client assets. Gates has joined **The Atlantic Group**, a well-established Ameriprise financial advisory practice led by founding partners and next-generation advisors **Andrew Lerner, APMA™, AWMA™, CFP, ChFC®**, and **Logan Shalmi APMA™** in Boca Raton, Fla.

As Gates evaluated the next chapter of his business, he prioritized finding a firm and team aligned with his long-term vision for clients and growth. The opportunity to join The Atlantic Group, a rapidly growing Ameriprise team led by next-generation financial advisors who share his vision for long-term growth, made the decision especially compelling.

"Ameriprise immediately stood out because of its commitment to helping advisors grow and the investments it continues to make in technology, planning capabilities and operational support," said Gates. "Those resources will help me deliver an even better experience for clients while creating greater efficiencies in my practice. Combined with the opportunity to join The Atlantic Group, a team that's building for the future and shares my growth-minded approach, it became clear that Ameriprise was the right fit for the next chapter of my business."

Gates and Shalmi have known each other for years, having attended high school together. That longstanding relationship, combined with a shared philosophy around client service and practice management, made the move a natural fit.

"As I explored different options, I kept coming back to the combination of Ameriprise and The Atlantic Group," said Gates. "Logan, Andrew and the team have built an impressive business with a collaborative culture and a clear vision for where they're headed. The opportunity to be part of that environment while continuing to elevate the client experience with the tools, resources and support of Ameriprise was especially appealing."

Since transitioning from Oppenheimer to Ameriprise in October 2025, The Atlantic Group has continued to build significant momentum, adding three financial advisors, three support staff members and more than \$400 million in client assets. Today, the practice includes 12 financial advisors and 10 support staff members who collectively manage approximately \$2 billion in client assets.

The team is supported locally by Ameriprise Branch Manager **Drew Granauro**, Ameriprise Complex Director **Daniel Landrau** and Ameriprise Regional Vice President **Michael Rearden**.

Ameriprise has continued to attract experienced, productive financial 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 the Ameriprise Ultimate Advisor Partnership

The Ameriprise **Ultimate Advisor Partnership** offers a differentiated experience for advisors that helps them accelerate growth while delivering an excellent client experience. Combined with the company's culture of support and independence, the Ultimate Advisor Partnership enables advisors to scale their businesses, deepen client relationships and drive referrals for future growth.

About Ameriprise Financial

At **Ameriprise Financial**, we have been helping people feel confident about their financial future for more than 130 years². With extensive investment advice, global asset management capabilities and insurance solutions, and a nationwide network of more than 10,000 financial advisors, we have the strength and expertise to serve the full range of individual and institutional investors' financial needs.

¹ Ameriprise Financial Q4 2025 Earnings Release.

² Company founded June 29, 1894

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Allison Harries, Media Relations

612.678.7035

allison.h.harries@ampf.com

Source: Ameriprise Financial, Inc.