



NEWS RELEASE

Powerful New Platform Attracts LPL Advisors to Ameriprise’s Financial Institutions Channel

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Advisor Matt Griffin says he and his team ‘made the right decision and feel great about their move to Ameriprise’

MINNEAPOLIS--(BUSINESS WIRE)-- Financial advisors **Matt Griffin** and **Jason Driver** recently joined the Ameriprise Financial Institutions Group (AFIG) from LPL with \$149 million in client assets. Their practice, Steward Concepts, a financial advisory practice of Ameriprise Financial Services, LLC, is in partnership with Family Trust Credit Union in Rock Hill, South Carolina. After evaluating multiple firms across the industry, Griffin and his team ultimately decided to join Ameriprise because of the firm’s dedication to clients, technology capabilities and the support they’ll receive to expand their footprint in new locations across the country.

This press release features multimedia. View the full release here:

<https://www.businesswire.com/news/home/20201029006193/en/>

Steward Concepts a financial advisory practice of Ameriprise Financial

“When I started my search for a new broker-dealer, my priority

was finding a firm that would be a good fit for my practice and Family Trust Credit Union,” said Griffin. “Ameriprise stood out among competitors because of the firm’s truly integrated technology platform that makes collaboration with clients easy. I was impressed that clients can video chat with me, move money and execute trades—all through Ameriprise’s app. And it was clear the leaders at Ameriprise are aligned with our vision to take our practice to the next level by expanding our services across the country.”

“Ameriprise’s new platform and structure is materially different from others in the industry,” said Susan McCarver,

senior vice president and chief financial officer of Family Trust Credit Union. “The firm brings transparency and stability in the way they serve their partners through a sophisticated program that will help us elevate the experience for our members and, at the same time, reduce back-office costs.”

Griffin and Driver joined Ameriprise along with chief of staff and client service associate Catherine Lieber and client service associates David Casey and Earl Mason.

Jay McAnelly, Ameriprise group vice president – AFIG, supports the team. “Matt and his team are focused on growth and providing outstanding service to their clients and Family Trust Credit Union members,” said McAnelly. “We have the tools, resources and leadership support to help make his team’s vision a reality.”

Ameriprise formed its Financial Institutions Group after acquiring Investment Professionals, Inc. (IPI) in 2017. Leveraging Ameriprise’s strength as a wealth manager and IPI’s expertise in serving the financial institutions market, the AFIG channel specializes in the on-site delivery of investment programs to banks and credit unions.

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.

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