



NEWS RELEASE

Team With \$100 Million in Assets Joins Ameriprise Financial to Fulfill Growth Aspirations

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Mila Kisz and Roman Kisz join LegacyOak Advisors, an established Ameriprise practice led by financial advisor Greg Lewandowski

MINNEAPOLIS--(BUSINESS WIRE)-- Financial advisors Mila Kisz, MBA, and Roman Kisz, AAMS[®], CRPS[®], recently joined the independent channel of Ameriprise Financial, Inc. (NYSE:AMP) from Edward Jones where they managed \$100 million in client assets. The married duo joined an established Ameriprise practice, LegacyOak Advisors, in Simi Valley, Calif., led by financial advisor Greg Lewandowski.

The Kisz's and Lewandowski originally met at Edward Jones before Lewandowski moved his practice to Ameriprise in 2022. Two years later, the Kisz's were looking to switch firms, so they reached out to Lewandowski to learn more about Ameriprise.

"We wanted to partner with a firm that offered independence, ownership in our business and the ability to work with a team," said Mila Kisz. "At the same time, Greg wanted to grow his team. We learned more about Ameriprise and LegacyOak Advisors and it became clear – the opportunity to form a team would benefit all involved, most importantly, our clients."

Kisz and Kisz are excited about Ameriprise's enhanced capabilities that will help them deliver an even greater experience to clients while giving them the opportunity to grow the business alongside Lewandowski. "We have ambitious growth goals to expand our footprint and help more clients across the country," said Roman Kisz. "We look forward to leveraging the firm's programs and capabilities to grow organically and through external practice

acquisition as an increasing number of advisors retire from the industry.”

“Mila and Roman have deep expertise and specialization in marketing and asset management, which is a great complement to the practice and will allow us to serve clients even more holistically,” said Lewandowski. “I’m thrilled to welcome them to our firm and look forward to growing our business together.”

LegacyOak Advisors includes three financial advisors and one relationship manager, **Phyllis Lugo**. The practice is supported locally by Ameriprise Franchise Field Vice President **Karl Bobo** and Ameriprise Regional Vice President **Marcus Ranger**.

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 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.

¹ Ameriprise Financial 2024 10-K.

² Ameriprise Financial Q4 2024 Earnings Release.

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Allison Harries, Media Relations

612.678.7035

allison.h.harries@ampf.com

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