



NEWS RELEASE

The Atlantic Group, Managing More Than \$1.6 Billion in Client Assets, Joins Ameriprise Financial

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Boca Raton, Fla.-based, 16-member team joins the branch channel of Ameriprise Financial

MINNEAPOLIS--(BUSINESS WIRE)-- Ameriprise Financial, Inc. (NYSE: AMP) today announced that **The Atlantic Group**, a financial advisory practice managing more than \$1.6 billion in client assets, has joined its branch channel from Oppenheimer & Co. Inc. Based in Boca Raton, Florida, the team comprises 16 professionals, including nine financial advisors and seven support staff. The practice is led by founding partners **Andrew Lerner, APMA™, AWMA™, CFP®, ChFC®,** and **Logan Shalmi.**

The Atlantic Group

Lerner and Shalmi, college roommates turned business

partners, built The Atlantic Group from the ground up. Over the past decade, they assembled a high-performing team and grew their practice organically by cultivating deep client relationships. Their move to Ameriprise represents a strategic evolution by unlocking access to cutting-edge technology, integrated platforms, and robust support to deliver even greater value to their clients.

“We’ve always prioritized delivering a high-touch, personalized experience to our clients,” said **Lerner**. “Ameriprise offers the advanced planning tools, broad range of investment products, and top-tier technology that allow us to take that experience to the next level.”

Shalmi echoed that sentiment, reflecting on the team’s founding values and long-term vision. “When Andrew and I started in this business, we made a commitment to build something lasting – a practice rooted in integrity and



client-first thinking,” he said. “Joining Ameriprise is a continuation of that journey. The firm’s platform gives us the tools to deepen relationships, expand our offerings, and grow with intention. We’re excited about what this means for our clients and our team, and we’re energized by the possibilities ahead.”

“The Atlantic Group embodies the client-first mindset and forward-thinking leadership we value at Ameriprise,” said **Pat O’Connell**, CFP®, Executive Vice President and President of the firm’s branch and financial institutions channels, who oversees Experienced Advisor Recruiting across the firm. “We’re proud to welcome them and look forward to a strong partnership as they continue to grow and make a meaningful impact for their clients and within the industry.”

Ameriprise Regional Vice President **Michael Rearden**, Complex Director **Daniel Landrau** and Branch Manager **Drew Granauro** also support the team locally.

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 2024 Earnings Release.

² Company founded June 29, 1894

Ameriprise Financial cannot guarantee future financial results.

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