



NEWS RELEASE

Two Advisor Teams With More Than \$760 Million in Assets Join Ameriprise for Support and Depth of Resources

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Financial advisor teams from Raymond James and Synovus Securities, Inc. join established Ameriprise practice, Gratium Wealth Planning

MINNEAPOLIS--(BUSINESS WIRE)-- Two teams of financial advisors recently joined the independent channel of Ameriprise Financial, Inc. (NYSE: AMP) with more than \$760 million in combined client assets. **Allan McClure, CFP®**, **CFA®** and **Daniel Bass, RICP®** were previously with Synovus Securities, Inc. in Birmingham, Alabama where they managed \$422 million in client assets. Separately, **Todd Barrow, AIF®**, **Brent Powers** and **Brandon Jorge, MBA** came from Raymond James with more than \$340 million in client assets in Lakeland, Florida.

Both teams joined an established Ameriprise practice, Gratium Wealth Planning, which is led by co-founders **James Evans, CRPC™**, **APMA™** and **Kris Kasturi CRPC™**, **APMA™**. **Tara J. Showalter JD, CFP®**, **APMA™**, **CRPC™**, managing director of Gratium Wealth Planning, handles recruiting and acquisitions for the practice. The team of 43 financial advisors and 25 support staff has 15 offices across Florida, Louisiana and Alabama and manages over \$2.8 billion in client assets.

McClure and Bass Drawn to Depth of Resource

Bass shared the top three reasons why he and McClure joined Ameriprise:

1. "Advancements in technology that allow us to spend more time with clients."



2. “Commitment to **goals-based financial planning** tools that are robust yet deliver clear and concise information.”
3. “A broad set of **investment solutions** for every type, style, and season of an investor’s financial lifecycle.”
“After seeing the depth of resources available at Ameriprise, we knew it was the place where we could best execute on our top priority of providing a superior client experience that puts clients’ needs first,” added McClure.

The team knew they wanted to join an existing Ameriprise practice with a collaborative approach to planning and investment management and Gratium Wealth Planning was a perfect fit. “Having a team like Gratium behind us allows us to channel more time and energy in developing even deeper relationships with the clients we serve,” McClure said. “The support of the practice will also be invaluable when the time comes for succession planning of our business.”

Paraplanner, **Charlotte Elliott**, joined along with McClure and Bass. The team is supported locally by Ameriprise franchise field vice president **Mike Barker** and regional vice president **Tres Rouquette**.

Barrow, Powers and Jorge Join for More Support

Barrow, Powers, and Jorge joined for greater support and shared values. “After meeting the team at Gratium and learning more about what Ameriprise has to offer, it was clear that we would get the kind of support we were looking for here,” said Barrow.

As advisors who primarily serve as 401(k) plan sponsors, they also wanted to focus on their specialty.

“401(k)s are a major part of our practice and it’s how we grow our business,” shared Powers.

“Now with the help of a large team around us, we can really focus on what we do best while the team provides greater support across other areas of our business,” added Jorge.

Operations specialists, **Hannah Simmons** and **Chila Wendle**, joined along with Barrow, Powers, and Jorge. The team is supported locally by Ameriprise franchise field vice president **Sabrina Tacheny** and regional vice president **Tres Rouquette**.

Ameriprise has continued to attract experienced, productive financial advisors, with approximately 1,700 joining the firm in the last 5 years.¹ Nine out of ten advisors who joined Ameriprise say the firm’s technology, financial planning capabilities and ability to acquire clients is better than their previous firm.² 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 more confident about their financial future for more than 125 years. With extensive investment advice, asset management and insurance capabilities and a nationwide network of approximately 10,000 financial advisors³, we have the strength and expertise to serve the full range of individual and institutional investors' financial needs.

Ameriprise Financial cannot guarantee future financial results.

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¹ Ameriprise Financial 2022 10-K.

² Ameriprise asked experienced advisors who moved their book of business to the firm in the last one-to-five years to compare its support, resources, and capabilities to their previous firm and state their satisfaction with their experience. The survey results identified the top ways Ameriprise stands out compared to competitors. 294 advisors responded to the "Ultimate Advisor Partnership" survey, which was conducted in November 2021.

³ Ameriprise Financial Q3 2022 Earnings Release.

Allison Harries, Media Relations

612.678.7035

allison.h.harries@ampf.com

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