



NEWS RELEASE

Two Advisors with Nearly \$150 Million in Assets Join Ameriprise for ‘Best-in-Class Technology’

2022-11-29

MINNEAPOLIS--(BUSINESS WIRE)-- Ameriprise Financial, Inc. (NYSE: AMP) recently added two advisors to its independent channel with nearly \$150 million in client assets. **Jason Crane, JD, CFP®** and **Gerry Owen, CPA**, who operate Crane & Owen Financial Solutions in Aiken, South Carolina, moved their practice from Edward Jones. Ameriprise became the top choice for their practice after they learned more about the robust resources and flexibility the firm provides to help advisors serve clients and grow their businesses.

Ameriprise Financial, Inc. (NYSE: AMP) recently added two advisors to its independent channel with nearly \$150 million in client assets. Jason Crane, JD, CFP® and Gerry Owen, CPA, who operate Crane & Owen Financial Solutions in Aiken, South Carolina, moved their practice from Edward Jones. From left to right: Gerry Owen and Jason Crane. Photo courtesy of Owen and Crane.

Culture and strong reputation among reasons that drew advisors to Ameriprise

Crane and Owen, who grew to manage \$147 million in client

assets, started evaluating options to move their practice two years ago. They explored a wide variety of firms and found Ameriprise was the best fit to help them gain efficiency so that they could spend more time working with clients and growing their business. In Ameriprise they found a large firm with a great reputation, vast resources and recognized and respected brand.

Reflecting on their decision, Crane said, “Ameriprise is first and foremost an ‘advisor friendly’ firm, meaning we have the company’s full support behind us as we go above and beyond for our clients. At the same time, we have the autonomy and flexibility to run our business according to our vision. They couldn’t be better partners in helping us serve our clients and grow our practice.”

Owen and Crane also found that Ameriprise delivered on what they wanted: a strong financial planning focus, top-tier technology and the opportunity to grow the number of advisors in their practice.

“Without question, Ameriprise has the best financial planning and technology stack in the market. Thanks to a more robust financial planning experience, I’m able to spend less time behind the scenes and more time with my clients. That, to me, is worth its weight in gold,” said Owen.

Crane and Owen are supported by Ameriprise Franchise Field Vice President **Michael Barker**.

Ameriprise has continued to attract experienced, productive financial advisors, with approximately 1,600 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 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.

Certified Financial Planner Board of Standards Inc. owns the certification marks CFP[®], CERTIFIED FINANCIAL PLANNER[™] and federally registered CFP (with flame design) in the U.S., which it awards to individuals who successfully complete CFP Board’s initial and ongoing certification requirements.

Ameriprise Financial cannot guarantee future financial results.

Ameriprise Financial Services, LLC is an Equal Opportunity Employer.

Investment products are not insured by the FDIC, NCUA or any federal agency, are not deposits or obligations of, or guaranteed by any financial institution, and involve investment risks including possible loss of principal and fluctuation in value.

Investment advisory products and services are made available through Ameriprise Financial Services, LLC, a registered investment adviser.

Ameriprise Financial Services, LLC. Member FINRA and SIPC.

© 2022 Ameriprise Financial, Inc. All rights reserved.

¹ Ameriprise Financial 2021 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.

Stephanie Siegle, Media Relations

612.671.2593

stephanie.siegle@ampf.com

Source: Ameriprise Financial, Inc.