



NEWS RELEASE

## Two Established Financial Advisors Who Started in the Industry Together Team up to Form New Practice at Ameriprise Financial

2023-09-11

Financial advisors Josh Perello and Jimmy Guidry say the onboarding support and resources from Ameriprise made their transition smooth and seamless

MINNEAPOLIS--(BUSINESS WIRE)-- Financial advisors **Josh Perello, AIF®** and **Jimmy Guidry** recently joined the independent channel of Ameriprise Financial Inc. (NYSE: AMP) with nearly \$150 million in client assets in Breaux Bridge, LA. Perello joins from Raymond James and Guidry from Edward Jones.

Perello and Guidry met in 2015 when they both worked at Edward Jones and stayed in touch after Perello left for Raymond James in 2017. In early 2023, Guidry started exploring options to move to a firm that provides more support and capabilities to serve his clients. He was impressed with everything offered by Ameriprise, and he called Perello to tell him about it.

"Shortly into that conversation, we both realized we were sitting on a golden opportunity to build an incredible practice together at Ameriprise," said Guidry.

"Financial planning is very important to us, which aligns perfectly with the Ameriprise value proposition," said Perello.

"Our clients already know and trust us, and now we can serve them even better as we help them achieve their most important goals for the future," added Guidry.

The onboarding team at Ameriprise facilitated a smooth experience for Perello and Guidry. “The hands-on support and digital transition capabilities from Ameriprise are top-notch,” said Perello. “After only one month, I have moved nearly 90% of my clients – and their feedback on switching to Ameriprise has been overwhelmingly positive.”

Joining Perello and Guidry is office manager **Cathy Taylor**. The team is supported locally by Ameriprise franchise field vice president **Mike Barker** 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.<sup>1</sup> To find out why experienced financial advisors are joining Ameriprise, visit [ameriprise.com/why](https://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 advisors<sup>2</sup>, 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.

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.

© 2023 Ameriprise Financial, Inc. All rights reserved.

---

<sup>1</sup> Ameriprise Financial 2022 10-K.

<sup>2</sup> Ameriprise Financial Q3 2022 Earnings Release.

Ameriprise Financial Q 2022 Earnings Release

612.678.7035

**[allison.h.harries@ampf.com](mailto:allison.h.harries@ampf.com)**

Source: Ameriprise Financial, Inc.