

Julie Wallace Moves Her \$100 Million Practice to Ameriprise Financial to Embrace Client-First Culture and Operational Excellence

Wallace says Ameriprise “offers a more robust financial planning experience to clients with less prep time behind the scenes”

MINNEAPOLIS – April 30, 2024 – Financial advisor **Julie Wallace** recently joined the independent channel of Ameriprise Financial, Inc. (NYSE: AMP) from Wells Fargo Clearing Services, LLC in Petaluma, California with over \$100 million in client assets.

The primary reason Wallace moved to Ameriprise was simple: She wanted more time to work directly with clients and help them reach their financial goals and dreams. “With support from Ameriprise, I can offer a more robust financial planning experience to my clients with less prep time behind the scenes because of all the integrated technology and tools the firm offers,” she explained. “It’s a game changer.”

“Fostering deep relationships with clients and putting their needs first is most important to me. So, when I saw how the firm shares my client-centric philosophy, it all felt right,” said Wallace. “I’m excited about the future growth of my practice at Ameriprise and look forward to helping even more people reach their financial goals.”

Wallace is joined by paraplanner and administrative assistant **Marion Wagner**. The team is supported locally by Ameriprise franchise field vice president **Dean McGill** and Ameriprise regional vice president **Marcus Ranger**.

Ameriprise has continued to attract experienced, productive advisors, with more than 400 advisors moving their practices to Ameriprise in 2023 and more than 1,700 in the last 5 years.¹ Nine out of ten advisors who joined Ameriprise in the last 5 years 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.

“Thanks to the integrated technology at Ameriprise, I am able to offer a more robust financial planning experience to my clients with less prep time.”

About Ameriprise Financial

At [Ameriprise Financial](https://ameriprise.com), we have been helping people feel more 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 advisors³, 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 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. 284 advisors responded to the “Ultimate Advisor Partnership” survey, which was conducted by the Ameriprise Strategic Insights team from October- November 2023.

³ Ameriprise Financial Q1 2024.

Ameriprise Financial cannot guarantee future financial results.

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