

## Advisor Team with \$250 Million Joins Ameriprise Financial From LPL for Enhanced Planning Capabilities, Support and Technology

### Monumental Financial Planning says they are “excited to leverage Ameriprise’s vast resources and industry-leading solutions to serve clients more comprehensively”

**MINNEAPOLIS – July 23, 2024** – Private Wealth Advisor **John Cortale** recently joined the independent channel of Ameriprise Financial, Inc. (NYSE: AMP) from LPL Financial in Washington D.C. with \$250 million in client assets. Cortale’s practice operates under the name **Monumental Financial Planning** (formerly The Cortale Group) and includes financial advisors **John Martin Moran** and **Nina Kamrani**, client service manager **Adam Mirza** and client service coordinator **Omaid Omar**.

Cortale and team joined Ameriprise for enhanced financial planning capabilities, greater firm support and fully-integrated technology. They were also drawn to the firm’s integrity and client-centric values.

The move underscores the team’s commitment to enhancing their client experience and delivering even greater value. “Our decision to join forces with Ameriprise Financial was driven by our unwavering dedication to giving the best possible experience to clients,” said Cortale. “We are excited to leverage Ameriprise’s vast resources and industry-leading solutions to better serve our clients and help them achieve their financial goals.”

At Ameriprise, Monumental Financial Planning can offer a broad range of investment options and solutions tailored to clients’ unique needs. “We are confident that our partnership with Ameriprise will empower us to continue delivering the personalized attention and holistic financial solutions that our clients want and need,” added Cortale.

The team is supported locally by Ameriprise franchise field vice president **Athena McGuire** and Ameriprise regional vice president **Tom North**.

Ameriprise has continued to attract experienced, productive financial advisors, with more than 400 advisors moving their practices to Ameriprise in 2023 and 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 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 130 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.

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<sup>1</sup> Ameriprise Financial 2023 10-K.

<sup>2</sup> Ameriprise Financial Q1 2024 Earnings Release.

Ameriprise Financial cannot guarantee future financial results.

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