Advisor Team with $250+ Million Joins Ameriprise Financial from LPL to Elevate Client Experience

MINNEAPOLIS – October 29, 2024 – Financial advisors **Kelly France**, CFP®, AWMA℠ and **Dan Lotts** recently joined a well-established independent Ameriprise Financial, Inc. (NYSE: AMP) practice, **River Prairie Wealth Partners**. The team is based in Altoona, Wisconsin and is led by Ameriprise Private Wealth Advisor **Adam Mohr**, CRPC™, APMA™. Together, France and Lotts have more than 30 years of experience in the industry, most recently with LPL Financial, and they join the firm with more than $250 million in client assets. **Melissa Hass-Goettl**, executive assistant, also made the transition to Ameriprise.

“We evaluated a variety of firms and the team at River Prairie Wealth Partners rose to the top,” said France. “Our shared philosophy for helping clients comprehensively, coupled with the vast support and resources of Ameriprise, gave me confidence that we’ll continue to provide a top-of-the-line client experience.”

Reflecting on the transition, Lotts added, “Ameriprise provides impressive technology and sophisticated financial planning tools that allow us to spend less time behind the scenes and more time going deeper with our clients, offering an elevated level of service.”

Advisors join a high-performing Ameriprise practice

“Kelly and Dan have a strong reputation in the community and are very well regarded amongst their peers,” said Mohr. “After meeting with them, it became immediately clear that they’re in this business for same reason we are – to help empower clients to reach their financial goals. We’re thrilled to welcome them to our team.”

River Prairie Wealth Partners employs a combined team of 29 advisors and 34 support staff who manage over $3 billion in client assets across eight office locations in Minnesota and Wisconsin.

The team is supported locally by Ameriprise Franchise Field Vice President **Brad Sabol** and Ameriprise Regional Vice President **Michael Lawson**.

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.[1] To find out why experienced financial advisors are joining Ameriprise, visit 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[2], we have the strength and expertise to serve the full range of individual and institutional investors' financial needs.

[1] Ameriprise Financial 2023 10-K.

[2] Ameriprise Financial Q2 2024 Earnings Release.