

Advisors With \$415M Combined AUM Join Ameriprise

Advisors with \$415 million in combined assets have made the move to Ameriprise, a spokesman said.

The recruits include UBS advisor Josh Shepherd and Stifel advisor Gary Whittaker. Both joined the employee channel at Ameriprise, according to the firm. Shepherd, based in Hingham, Mass., had \$68 million in client assets before making the move, and Whittaker, located in Jacksonville, Fla., had \$61 million, the spokesman said.

Three other recruits went over to the independent side at Ameriprise. Former Raymond James advisor Scott Husnick of Amery, Wis., oversaw \$143 million in client assets prior to making the move, according to Ameriprise's spokesman. Buzz Minton, formerly with LPL and based in Altoona, also in Wisconsin, had \$72 million, the spokesman said.

Former Janney Montgomery Scott advisor Fredric Woloshin had \$71 million in client assets, according to the spokesman. Woloshin is based in Conshohocken, Pa.

The moves go back to late October.

Shepherd began his career in 2003 with A. G. Edwards, and stayed on when the firm was acquired by Wachovia, according to FINRA BrokerCheck records. He joined UBS in 2008. Whittaker also began with A. G. Edwards in 1986, and stayed with the firm a decade before moving over to Paine Webber in 1996, according to BrokerCheck. He moved to Raymond James three years later.

Husnick's career goes back to 1999, and includes stops at U.S. Bancorp and Wells Fargo, as well as A.G. Edwards, according to BrokerCheck. He joined Raymond James in 2009. Minton has worked nearly four decades in financial services. He began at Travelers Equity Sales in 1978, and has worked for FSC Securities and LPL, the latter which he joined in 2006, BrokerCheck records show.

Ameriprise also recently recruited an M.J. Whitman advisor with \$230 million in client assets, the firm said.

After spending the first 27 years of her securities career with M.J. Whitman, advisor Sandra G. Smith moved to Ameriprise's employee channel at the firm's Midtown Manhattan office, according to Ameriprise.