

# Ameriprise recruiting sweep nets advisers with \$1B in combined AUM

Ten advisers with \$1 billion in combined client assets have joined Ameriprise, according to the firm.

Ameriprise's latest recruiting sweep stretched from late August to October. The advisers joined the firm's employee and independent channels, with the largest contingent coming from Wells Fargo Advisors.

In the largest of the moves, former Morgan Stanley advisers Mark Filla and Scott Latzke managed \$344 million in client assets before moving to Ameriprise's employee side, the firm said. They switched firms Oct. 21, according to FINRA BrokerCheck records.

The duo, operating as the Filla Latzke Group, is based in Milwaukee where they report to branch manager Paul Jackson. They said in a statement that they made the move in part because of Ameriprise's capabilities.

Filla began his career with Morgan Stanley in 2001 while Latzke joined the firm two years later, according to FINRA BrokerCheck records.

Among those departing Wells Fargo was **Todd Darling**, who had overseen \$104 million in client assets before switching firms, according to Ameriprise. He is based in Middletown, Massachusetts, and reports to Complex Director David Shnitzer. Darling had been with the wirehouse since 2004 and had previous work experience at UBS and Smith Barney, per BrokerCheck.

Scott Gongorek also left Wells Fargo where he had overseen \$82 million in client assets, according to Ameriprise. He is based in Downers Grove, Illinois, and reports to Branch Manager Jason Bailey. Gongorek had been with Wells since 2008, according to BrokerCheck.

Richard Dunagan had overseen \$72 million in client assets at Wells, according to Ameriprise. He is based in Austin, Texas, and reports to Branch Manager John Piland. Dunagan had been with the wirehouse since 2003, BrokerCheck records show.

Former Wells Fargo adviser Matthew Neely joined Ameriprise's independent side. He oversaw \$78 million in client assets while at Wells Fargo Financial Network, according to Ameriprise. Neely is based in Williamston, Massachusetts. He became affiliated with Wells in 2008, according to BrokerCheck.

Also joining Ameriprise's independent side is Michael Andriaccio, who had overseen \$78 million while affiliated with Cetera, according to the firm. He is based in Buffalo, New York. Andriaccio had been with Cetera since 2001, per BrokerCheck.

Robert Rae left RBC where he had been overseeing \$105 million in client assets to join Ameriprise, the firm said. He is based in Edina, Minnesota, where he reports to Branch Manager Jonathan Frigo. Rae had been with RBC since 1998, according to BrokerCheck.

Also joining from RBC is Robert Streed, who oversaw \$76 million in client assets while he was at the firm, according to Ameriprise. Streed will report to branch manager Ryan McCabe and is based in Bedford, New Hampshire. He had been at RBC since 2007, according to BrokerCheck. He previously worked at Morgan Stanley.

Ex- MSI Financial Services adviser Tena Kautz oversaw \$76 million in client assets before joining Ameriprise, the firm said. She reports to Branch Manager Dean Obenauer. Kautz had been with MSI since 1998, per BrokerCheck.