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Dream Team

THOMAS RODMAN AND LISA MARKGRAF HAVE BUILT A THRIVING PRACTICE AT **AMERIPRISE FINANCIAL** CENTERED ON STRONG RELATIONSHIPS WITH CLIENTS AND SOUND, PERSONALIZED FINANCIAL ADVICE.

BY MATT COSENTINO

PHOTOS BY ALISON DUNLAP

In 2020, Rodman was approached by Ameriprise Financial about coming on board, and he quickly realized it was a firm with the same set of principles that was investing in their advisors' business and continued growth. Ameriprise's network currently includes more than 10,000 advisors, of which more than 2,000 are employees of the company and more than 7,000 are independent franchises (Source: Ameriprise Financial Q3 2022 Earnings Release).

"It's one of the fastest-growing companies in the industry," Rodman says. "Ameriprise encourages their advisors to grow and build their business."

Rodman's team includes the person he frequently refers to as his "right arm," Lisa Markgraf, as well as insurance and planning specialists. Markgraf serves as a Registered Client Service Associate, and her responsibilities range from establishing accounts for clients to acting as their contacts for any issues that may arise on a daily basis.

Like Rodman, Markgraf discovered an interest in finance early on and has been in the business for 20 years. "It actually landed in my lap and it was something that was intriguing to me when I was in my young 20s," she says. "As I started getting into it, I built relationships and just formed a passion for it."

Rodman and Markgraf first met nearly two years ago, but to hear them interact it seems as if their partnership goes back much longer. It became apparent right from their first conversation that they would make a strong duo.

"We talked one day and it seemed that

While it usually takes time for most children to learn the value of a dollar, Thomas Rodman was fortunate to absorb the lesson at a young age. In fact, while other kids in his class were still playing with action figures, he was already discovering his entrepreneurial spirit, and at age 12 he took the bold step of starting his own landscaping business.

Needless to say, the experience of managing money, serving clients, and taking pride in his work left a lasting impression.

"My dad taught me to invest in companies that exhibit solid fundamentals, strong earnings powers, and the potential for continued growth," Rodman says.

Forty years later, Rodman is the one dispersing words of wisdom as a financial advisor and Managing Director at Ameriprise Financial. He has 23 years of experience at several of the most renowned firms in the industry, including a long tenure as a senior executive and the past 15 years as an advisor focusing on retirement, insurance and estate planning, cash flow management strategies, managing wealth, and more.

pretty much everything we said was the same as how the other felt, so we realized working together was meant to be," she says. "We clicked instantly over our motivation, our business ethics, and our future

goals, so we joined forces and have become the team to be reckoned with."

Clients have countless options to choose from when seeking a financial advisor, but Rodman stands out for a variety of reasons, not the least of which is his desire to build close personal relationships with his clients and their families.

Rodman shares his cell phone number with clients, and it is quite common for him to take calls as early as 6 a.m. or as late as 9 p.m. He prefers an old-fashioned conversation to email, but regardless of the method, communication is a constant, and determining a client's unique needs—and then delivering a customized plan—is paramount.

"The way that we're different is through our priorities," Rodman says. "We build close relationships and trust with our clients and their families. We truly care about our clients' well-being and family life. That's very important. The investment side is kind of easy after doing it for 23 years. It's more about the people and taking care of their family, their legacy, and what they want to do moving forward."

Because Rodman will meet quarterly, monthly, or even weekly with clients depending on their needs, he is able to fully understand their goals, their risk tolerance, and their comfort level with different investments before making recommendations. He also firmly believes in education, whether he is stressing the importance of a 529 plan for a child's college expenses, managing market risk and volatility through turbulent times, or long-term planning to help finances last well into retirement. He wants his clients to ask questions and fully grasp the strategies.

"I tell my clients, 'If you don't understand what you're doing with whoever you're working with, it's probably not the right thing for you,'" he says.

Another unique aspect of Rodman and team is their refusal to stereotype or judge anyone who is referred to them. There is no "typical" client because they are open to working with all types of investors.

"No amount is too small: If you need help, we will help you

any way possible," Markgraf says. "We don't forget where we came from, and we know exactly what it's like when a dollar goes a long way. A fortune to some people may be valued differently by others, so we want to make sure that every client is treated exactly the same way, no matter how much money they have. This is what helps build trust and strengthen the relationship. Their referrals go a long way."

It is no surprise that Rodman has been the recipient of several awards recognizing the "white glove" service he provides, or that clients will often recommend that friends or family members trust him with their financial concerns. Those referrals soon realize that even in times when the market is fluctuating, their portfolio is designed to factor in those changes and Rodman will strive to keep them balanced.

Down the line, when he can help them achieve their dreams, no feeling is better.

"It is very rewarding, especially if they're with us for 10 years and all of a sudden we see them reach their goals such as the second vacation home, extra family vacations, or even see them retire early," he says. "We have a plan, and if you stick with the plan, it works. We have over 40 years of experience and we care—that's the most important thing." ■



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**—THOMAS RODMAN,
FINANCIAL ADVISOR AND
MANAGING DIRECTOR AT
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