Corporate Champion Circle Member: Ameriprise Financial Services, LLC

United Way of the Tri-Valley Area launched its Corporate Champion Circle in the summer of 2018. Circle members partner with United Way for one year, support their community, and receive unique marketing benefits. Corporate Champion Circle members contribute at one of three giving levels - Platinum ($5,000), Gold ($3,000), and Silver ($1,500). To recognize Corporate Champion Circle members, and to get to know those who are passionate about United Way, we have started a series that profiles these dedicated businesses. Please welcome Ameriprise Financial Services, LLC located in Jay, Maine.

Michelle Maki, Private Wealth Advisor, owner of Ameriprise Financial Services, LLC in Jay recently joined the United Way's Corporate Champion Circle. Michelle grew up in Jay and graduated with a BA degree in psychology from UMF. While attending UMF, Michelle met her husband, Steve Maki (owner of Spruce Mountain Pharmacy). Michelle's father owned IDS Financial Services (now Ameriprise Financial) in Wilton since 1988 when Michelle started her career with her father in 1993 as an assistant, eventually working her way up to an Associate Financial Advisor, & in 2000 she transitioned to a financial advisor. Today she is recognized as a Private Wealth Advisor for Ameriprise which is based on her professional designations and dedication to ongoing customer service. This puts her in the top 12% of the company!

The Ameriprise Financial Service office in Jay currently has three team members – along with Michelle are, Rebecca Durant-Vining, Office Assistant, Christiane Wadsworth, Financial Advisor. Ameriprise is a Fortune 500 Company with more than 10,000 financial advisors. Michelle belongs to the Women's Empowerment group with Ameriprise. Michelle and her team are here to *"help people save for their goals, and their goals align with their values while saving in the most tax efficient manner"*.

Ameriprise offers a variety of products and services from investments, certificates, stocks, bonds, insurance (life & disability and long-term care) to small business retirement plans. Many people are looking for advice on how their investments relate to their goals, are they saving enough for retirement, or the kids' education, or anything that is important to them. Advice allows us to tie everything together and really show how you are progressing to meet your goals. They work with people on distribution strategies and will work with your tax and estate planning professions.

Michelle was asked about some of the challenges and opportunities she sees in the community. Her response was – *"I think with high inflation and the cost of buying the simple things like groceries and gas or even home repairs people find their paycheck isn't stretching as far.* She concluded with – *"I also see community members reaching out help each other in this time of need. If someone is sick or needs a ride, there are friends, family, neighbors and at times strangers willing to step up and help".*

When asked about becoming a CCC member, Michelle replied, *"My husband, Steve and feel it is important to give back to our community and by partnering with UWTVA and the programs, like CA$H (free tax prep), Packs for Progress, Hope Fund (youth being able to stay active and play a sport, instrument, etc.) is a great way for us to be able to continue giving back to the community and reach more people, especially youth".*

Michelle still lives in Jay with her husband Steve and their two dogs. In her spare time, Michelle values time with family and friends. You can often find her outdoors, walking, golfing, fishing, or kayaking. Her boys may be done playing hockey, but she still enjoys watching a good game.