



SHORE TO SUMMIT
WEALTH MANAGEMENT

EXPERIENCED ADVISOR MAKES THE MOVE FROM AMERIPRISE FINANCIAL TO SHORE TO SUMMIT WEALTH MANAGEMENT



Shore to Summit Wealth Management, an independent advisory practice serving the financial goals of individuals, businesses, and corporate retirement plan sponsors, has added Jim Hilliard, Financial Advisor, to its growing network in Maryland. Jim will serve as the Managing Director at our new Severna Park location, bringing 25+ years of experience to the Shore to Summit team.

Early in his career, Jim found joy in providing exceptional client service as well as helping clients work towards their financial goals and objectives. Jim enjoys the family aspect of the wealth management industry and working closely with his clients and their unique family dynamics. Jim's brother, Mike, also works for Shore to Summit and the two brothers enjoy building a true family business.

"We couldn't be more excited for Jim to join Shore to Summit! Jim was one of my trainers at IDS Financial Services, now known as Ameriprise, way back in 1994. I am appreciative of his support back then and look forward to working with him" Says Scott Brown, CEO of Shore to Summit.

Jim has been married to his wife, Carrie, for over 26 years and they have loved raising their two children in Severna Park. They enjoy being empty-nesters and seeing their kids thrive in college and enter the professional world. In his spare time, Jim enjoys traveling and playing golf with clients and friends alike. Jim has resided in Severna Park since the early 80s and graduated from The University of Maryland College Park.

Shore to Summit is a wealth management company located in multiple cities across the US. The Shore to Summit team is dedicated to helping clients manage the increasing complexities that come with growing wealth. For more than 20 years, we have helped corporate executives, business owners, physicians, attorneys, families, and individuals to achieve their financial goals. Our highly skilled team applies their diverse skill sets and collective wisdom to help simplify the complexities for each of our clients.

Investment products and services are offered through Wells Fargo Advisors Financial Network, LLC (WFAFN), Member SIPC. Shore to Summit Wealth Management is a separate entity from WFAFN.