



SHORE TO SUMMIT
WEALTH MANAGEMENT

For Immediate Release:

Shore to Summit Wealth Management announces a new Financial Advisor joining Shore to Summit Wealth Management, LLC in the Annapolis, Maryland location.

Bozeman, MT – April 30, 2023:

Dan Parnes joins Shore to Summit Wealth Management, LLC, following a successful career with Wells Fargo PCG. Dan started his career working for Legg Mason Wood Walker. Dan will serve as a Financial Advisor at the Annapolis, MD location.

Dan Parnes affiliated with Shore to Summit in April of 2023 bringing over 23 years of industry experience to the company. He enjoys getting to meet new clients and helping develop retirement strategies for both businesses and individuals. He takes pride in creating portfolio models that can be utilized for core and satellite portfolios as well as utilizing relative strength technical analysis, portfolio and risk management, objective asset allocation designed for the individual, options strategies, and insurance where appropriate.

“I’m excited to join a group of like-minded individuals who value client service, planning, and unique portfolio management. As someone familiar with the Wells Fargo Advisors platform I am happy that I can work as an independent advisor and still have access to all the same products and tools my clients have used for years,” remarked Dan Parnes, Financial Advisor.

An accomplished Hockey player and graduate from University of Maryland College Park, he has called the DC area home for 16 years. Dan enjoys the winter season, getting on the slopes whenever he can, and catching the Washington Capitals when they are in town. Dan enjoys going to live music concerts and traveling.



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About Shore to Summit Wealth Management:

Shore to Summit Wealth Management is an independent, private client practice based in Bozeman, MT and Annapolis, MD. Shore To Summit is dedicated to helping clients manage the complexities that come along with growing wealth. A client-first service model is the foundation and driving force behind the company.

shoretosummitwm.com

ABOUT WELLS FARGO FINANCIAL NETWORK:

About Wells Fargo Financial Network: For 20 years, Wells Fargo Advisors Financial Network, the independent brokerage arm of Wells Fargo & Company, has simplified independence by partnering with successful financial advisors and fostering a mutual passion for doing what's right for clients. Investment products and services are offered through Wells Fargo Advisors Financial Network, LLC, Member SIPC, a registered broker-dealer and non-bank affiliate of Wells Fargo & Company. www.wfafinet.com

Shore to Summit Wealth Management is a separate entity from Wells Fargo Advisors Financial Network, LLC.