

For Immediate Release :

Shore to Summit Wealth Management announces our new Managing Director, Doug Davis.

Bozeman, MT – October 1, 2024

Scott L. Brown, CEO & Founding Partner and Benjamin D. Spiker, COO and Founding Partner of Shore to Summit Wealth Management, LLC had this to say about Doug Davis joining the team, “We are both humbled and excited to have Doug Davis join Shore to Summit. Doug brings a wealth of experience and an enthusiastic commitment to serving his clients. Doug will spearhead the newest STSWM office in the southeast.”

Doug Davis, Managing Director, shared his decision about joining Shore to Summit Wealth Management, stating, “After interviewing several advisory / wealth management practices on a potential merger, Shore to Summit became the obvious choice based on our uncompromising client-first philosophies, and collaborative resources. They deliver a deep commitment to integrity, transparency, and personalized strategies that make this a perfect mutual fit. This is an outstanding, highly talented group of people, and I am eager to share this trusted relationship with my client relationships for years to come.”

After working for two decades with leading Wall Street firms in Memphis, TN and Portland, OR, Doug founded Davis Investment Strategies, LLC, in 2010 to offer a more personalized experience for his client relationships. Over his career, Doug has consulted and trained hundreds of financial professionals on ethics-based client relations. He has served as a panelist and guest speaker at industry and sports conventions in fifteen states, and his articles and viewpoints have appeared in national print media. In 2024, Doug merged his practice with Shore to Summit Wealth Management to further leverage collaborative resources and strategic planning for his national clientele.

A gifted communicator and trusted financial steward, Doug conveys an unbiased educational clarity that his clients have long appreciated. His main areas of focus are comprehensive investment and retirement planning strategies alongside discretionary portfolio management. Additionally, he is an important liaison with estate attorneys and CPAs for multi-generational legacy planning. Doug holds Series 7, 24, 63, 65 and life/health insurance licenses.

Among his volunteer contributions, Doug has served active-duty U.S. military families with his son at Camp Malibu (Canada). In the community, he has assisted on church finance, endowment, and stewardship committees and has also coached youth football, basketball, and Little League baseball. Doug has participated in high school mentorship events and has been a youth Sunday School teacher and small group couple’s leader. A

former Bulldog tennis letterman, Doug is the current Vice President of the Mississippi State "M" Club.

After 27 years in Oregon, Doug and his wife, Jennifer, now reside in the college town of Starkville, Mississippi. They have two grown children in Texas and North Carolina, plus, a mini-golden doodle at home. Away from the office, Doug is active in his church and enjoys attending Mississippi State sporting events, traveling, photography, and working on his golf game.

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

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