



SHORE TO SUMMIT
WEALTH MANAGEMENT

For Immediate Release:

Shore to Summit Wealth Management announces our new Managing Partner, Strategic Growth, Kenneth J. Jubert.

Bozeman, MT – August 1, 2024:

Scott L. Brown, CEO & Founding Partner of Shore the Summit Wealth Management, LLC had this to say about Kenneth J. Jubert joining the team, "We are thrilled to announce that Ken J. Jubert has joined Shore to Summit Wealth Management, LLC, in the role of Managing Partner, Strategic Growth. Ken brings a wealth of talent in growing and managing divisions and business units including expertise in business development, recruiting, mergers & acquisitions, and relationship management to our rapidly growing wealth management partnership."

Ken brings over 18 years of success as an innovative divisional business leader to the team. Prior to joining Shore to Summit Wealth Management, LLC, Ken spent the last 15 years as a divisional and regional leader within Wells Fargo Advisors. He last served as Regional Head, Senior Vice President for Wells Fargo Advisors Financial Network growing and managing the Western Division and select states within the Central Division.

Ken Brings a wealth of talent in growing and managing divisions and business units including expertise in business development, recruiting, mergers & acquisitions and relationship management to our rapidly growing wealth management partnership. Ken had been a trusted partner during his tenure at Wells Fargo Advisors Financial Network to Shore to Summit having played a key role in recruiting our founders Scott Brown and Ben Spiker to WFA Financial Network in 2017. We are looking forward to Ken's unique perspective on enhancing culture and building relationships. Prior to his wealth management career Ken spent over 15 years in Information Technology helping customers build, run and secure hardware and software applications.

Ken resides in Portland, OR and is an avid enthusiast of vintage cars, watches and art. Originally from Ohio, he has embraced the outdoor lifestyle of the Pacific Northwest and enjoys hiking, biking, camping, golfing and most recently he's added Latin dancing to his activities. Ken is active in the Portland and Seattle art communities and is a member of the Black African American Advisor Association and National Sales Network.

Ken earned his Bachelor's degree in business administration from Wittenberg University in Springfield, Ohio.



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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:

For more than 20 years, Wells Fargo Advisors Financial Network, the independent contractor business model of Wells Fargo Wealth & Investment Management (WIM), has offered financial advisors more control, flexibility, and growth around business ownership as well as support from one of the nation's largest financial institutions. WIM provides financial products and services through various bank and brokerage affiliates of Wells Fargo & Company. Investment products and services are offered through Wells Fargo Advisors Financial Network, LLC, Member SIPC (WFAFN), a registered broker-dealer and non-bank affiliate of Wells Fargo & Company. Any other referenced entity is a separate entity from WFAFN.

