

For Immediate Release :

Shore to Summit Wealth Management announces our new Partner, Kris Moos, and Client Relationship Manager, Jaclyn Moos to our Bozeman, MT office.

Bozeman, MT – May 1, 2025

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 Kris and Jaclyn Moos joining the team, "We are both humbled and excited to have Kris Moos, and his wife Jaclyn Moos join the STSWM team. Kris brings his wealth of experience, personal warmth, and enthusiastic energy to serving clients to the STSWM team. Jaclyn will combine her marketing, event planning and high touch customer service skills to round out our client services team in Bozeman."

Shore to Summit Wealth Management is an independent, private client practice headquartered in Bozeman, MT and Annapolis, MD. Shore to Summit Wealth Management has additional offices in Florida, Mississippi, and Pennsylvania. Surpassing 2.3 billion in assets under management in April 2025, explosive growth of the practice is anticipated for 2025. Shore to Summit Wealth Management maintains a client first service model that is the foundation and driving force behind the company. For more information go to www.shoretosummitwm.com.

Kris Moos began his career in 2000 with Waddell & Reed in Bozeman, MT, where he quickly developed a passion for creating tailored financial strategies and fostering deep client relationships. This commitment to personalized service led him to establish Moos Financial Services in 2003 as an independent wealth management advisor. As his client base and relationships grew, Kris identified an increasing need for comprehensive wealth creation and investment strategies. This realization led to the transformation of his firm into Moos Wealth Management in 2021, reinforcing his commitment to a highly personalized approach.

Jaclyn Moos is dedicated to fostering strong client relationships and helping ensure a smooth, supportive experience for those she works with. With a background in brand and marketing strategy, account management and client engagement, she focuses on clear communication, organization, and proactive problem-solving to help clients feel confident in their financial journey.

She earned a Bachelor of Science in Business Marketing and Business Management from Montana State University and has spent over 20 years in client service, project and team management, and communication strategy. Over the years, she has developed a thoughtful, detail-oriented approach to streamlining processes and helping ensure that clients receive personalized and attentive service.

Beyond their professional endeavors, Kris and Jaclyn are deeply rooted in his Montana community. Kris and Jaclyn live in Bozeman with their two children, Hudson, and Harper. Kris is an avid outdoorsman; he is a passionate advocate for wildlife and ecosystem conservation. Jaclyn keeps busy shuttling between kid activities, working, and escaping to the mountains for a hike, she embraces the beautiful chaos of it all.

Shore to Summit Wealth Management is excited to welcome Kris and Jaclyn Moos to our practice.

ABOUT WELLS FARGO ADVISORS 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.