

FOR IMMEDIATE RELEASE

Shore to Summit Wealth Management opens office in Minersville, PA and welcomes new partner, Mark Serrian

Bozeman, MT – November 14, 2025 – Shore to Summit Wealth Management, LLC (STSWM) is proud to announce the opening of a new office in Minersville, PA led by Mark Serrian. Mark brings over 30 years of experience in the industry and provides a foothold in the central Pennsylvania market for Shore to Summit Wealth Management, LLC.

“We’re thrilled to expand our presence with this new location, the third office of STSWM in Pennsylvania” said Scott L. Brown, CEO & Founding Partner. Benjamin D. Spiker, COO & Founding Partner commented “We are excited to welcome Mark Serrian as such a seasoned professional to our STSWM team. Mark is another great example of a financial advisor joining our organization because he values independence and true partnership.”

Meet the Minersville Office:

Mark Serrian, Partner

Mark Serrian joins Shore to Summit Wealth Management as a Financial Advisor based in Minersville, Pennsylvania. With more than 35 years of experience in the financial services industry, Mark specializes in helping clients align their unique goals, values, and needs through holistic investment planning and investment strategies.

He offers a comprehensive suite of services, including investment planning, portfolio management for individuals, families, and businesses, pension consulting, and adviser selection. Mark holds FINRA Series 9, 10, 63 and 65 certifications, underscoring his commitment to maintaining the highest standards of professional knowledge and ethics.

Through an in-depth discovery process, Mark develops a true understanding of each client’s situation, time horizon, and risk tolerance. He focuses on growing and

protecting the wealth of high-net-worth individuals, families, corporate executives, and business owners. Leveraging the extensive resources and leadership of Shore to Summit Wealth Management and the Wells Fargo Advisors Financial Network [WFAFN], Mark provides clients with the strategies and guidance needed to pursue their long-term goals and address complex financial challenges.

Mark lives in Pottsville, PA with his wife and two children, ages 25 and 16. Mark enjoys church, time with family and friends, and football (go Eagles) in his spare time. Mark volunteers his time as a wrestling coach at a local high school.

Joining Mark is his new Client Relationship Manager, Maddie Zimmerman.

Maddie Zimmerman, Client Relationship Manager

Maddie Zimmerman joined Shore to Summit Wealth Management in the fall of 2025 as a Client Relationship Manager in our Minersville, PA office. She contributes her creativity, diligence, and commitment to client service to her new role. Maddie earned her degree from Berklee College of Music, studying songwriting and music production—an experience that reflects her lifelong dedication to creativity and disciplined craftsmanship.

Outside of work, Maddie leads worship and directs her church's annual Vacation Bible School. She enjoys songwriting, fashion, painting, and drawing, pursuits that continue to inspire her both personally and professionally.

About Shore to Summit Wealth Management

Shore to Summit Wealth Management is an independent private wealth practice headquartered in Bozeman, MT, with offices in Annapolis, MD; Melbourne, FL; Starkville, MS; Hanover and Cranberry Township, PA, Bethesda, MD, Portland, OR, Seattle, WA, St. Louis, MO and now Minersville, PA. With over \$4 billion in assets under management as of October 2025, STSWM continues its robust growth through a commitment to personalized, client-centered financial strategies.

Learn more at: www.shoretosummitwm.com

About Wells Fargo Advisors Financial Network

For more than 20 years, Wells Fargo Advisors Financial Network LLC (WFAFN), 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 affiliates of Wells Fargo & Company. Investment products and services are offered through Wells Fargo Advisors Financial Network, LLC, (WFAFN) Member SIPC , a registered broker-dealer and non-bank affiliate of Wells Fargo & Company. Any other referenced entity is a separate entity from WFAFN.