FOR IMMEDIATE RELEASE

Shore to Summit Wealth Management adds 700 million AUM and new flagship office in Bethesda, MD

Bozeman, MT – August 11, 2025 – Shore to Summit Wealth Management, LLC is proud to announce the opening of a new flagship office in Bethesda, Maryland, led by Managing Partners Jon Lindenberg and Mark Jutkowitz, CFP®, CDFA®. The new Bethesda Office adds 700 million in AUM to Shore to Summit Wealth Management practice.

“We’re thrilled to expand our national presence with this new location,” said Scott L. Brown, CEO & Founding Partner. Benjamin D. Spiker, COO & Founding Partner commented “With Jon and Mark’s leadership, the Bethesda office will serve as a cornerstone for growth, welcoming financial advisors who value independence and control while leveraging partnership and economies of scale.”

Meet the Bethesda Office Leaders:

Jon Lindenberg

With over 25 years of experience helping clients build, preserve, and transition wealth, Jon brings deep expertise and a client-first approach, particularly in serving business owners. He is a former Platinum Council Advisor at Wells Fargo Advisors and part of a team named a 2023 and 2025 Forbes Best-in-State Wealth Management Team. Jon was also ranked #20 in the state of MD as a Forbes Best-in-State Wealth Advisor in 2025. Jon earned his bachelor’s degree from Skidmore College, with additional studies at Georgetown University and Virginia Commonwealth University.

Jon lives in Clifton, VA with his four children—Peyton, Cassidy, Taylor, and Brody—and one rescue pup Luna.

Mark Jutkowitz, CFP®, CDFA®

Mark joined Shore to Summit in July 2025 after years at the Lindenberg Wealth Management Group of Wells Fargo Advisors. Known for guiding clients through life transitions with proactive planning, Mark is a 2023 and 2025 Forbes Best-in-State Wealth Management Team honoree and a 2024 and 2025 AdvisorHub Advisors to Watch: 100 NextGen recipient. He holds both the CERTIFIED FINANCIAL PLANNER® and Certified Divorce Financial Analyst® designations.

A former Division I lacrosse player at the University of Maryland, Mark now gives back by coaching youth lacrosse and representing the Israeli National Lacrosse Team internationally.

About Shore to Summit Wealth Management

Shore to Summit Wealth Management is an independent private wealth firm headquartered in Bozeman, MT, with offices in Annapolis, MD; Melbourne, FL; Starkville, MS; Hanover and Cranberry Township, PA and now Bethesda, MD. With over $3.0 billion in assets under management as of July 2025, the firm 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

Wells Fargo Advisors Financial Network (WFAFN) is the independent contractor division of Wells Fargo Wealth & Investment Management, offering advisors flexibility and support from one of the nation's largest financial institutions. WFAFN, Member SIPC, is a registered broker-dealer and non-bank affiliate of Wells Fargo & Company.

2025 Forbes Best-In-State Wealth Advisors; Awarded April 2025; Data compiled by SHOOK Research LLC based on the time period from 6/30/23- 6/30/24 (Source: Forbes.com). The Forbes Best-in-State Wealth Advisors rating algorithm is based on the previous year's industry experience, interviews, compliance records, assets under management, revenue and other criteria by SHOOK Research, LLC. Investment performance is not a criterion. Self-completed survey was used for rating. This rating is not related to the quality of the investment advice and based solely on the disclosed criteria.

2025 Forbes Best-in-State Wealth Management Teams: Awarded January 2025; Data compiled by SHOOK Research LLC based on the time period from 3/31/23 - 3/31/24 (Source: Forbes.com). The Forbes Best-in-State Wealth Management Teams rating algorithm is based on the previous year's industry experience, interviews, compliance records, assets under management, revenue and other criteria by SHOOK Research, LLC. Investment performance is not a criterion. Self-completed survey was used for rating. This rating is not related to the quality of the investment advice and based solely on the disclosed criteria. 11,674 wealth management teams were considered for the rating; 5,331 (45.66% of candidates) were named 2025 Forbes Best-in-State Wealth Management Teams

2023 Forbes Best-in-State Wealth Management Teams: Awarded January 2023; Data compiled by SHOOK Research LLC based on the time period from 3/31/21 - 3/31/22 (Source: Forbes.com). The Forbes Best-in-State Wealth Management Teams rating algorithm is based on the previous year's industry experience, interviews, compliance records, assets under management, revenue, and other criteria by SHOOK Research, LLC, which does not receive compensation from the advisors or their firms in exchange for placement on a rating. Investment performance is not a criterion. Self-completed survey was used for rating. This rating is not related to the quality of the investment advice and based solely on the disclosed criteria.

The 2025 AdvisorHub Advisors to Watch: Awarded June 2025; Data compiled by AdvisorHub based on the time period from 12/31/23 - 12/31/24 (Source: AdvisorHub) The AdvisorHub 2025 Advisors to Watch (A2W) rating produced by AdvisorsHub is based on industry experience, assets under management, revenue, growth, compliance records, professionalism, and other criteria. Investment performance is not a criterion. Self-completed survey was used for rating. The rating is not related to the quality of the investment advice and is based solely on the disclosed criteria. A2W winners are then ranked into subcategories based on scale, growth and professionalism with each winner being ranked into only one subcategory. The 100 Next Gen ranking is a subcategory of the AdvisorHub 2025 Advisors to Watch rating and does not denote an additional rating. 1974 wealth managers were considered for the rating; 1000 (50.6% of candidates) were named 2025 AdvisorHub Advisors to Watch.

2024 AdvisorHub Advisors to Watch: Awarded June 2024; Data compiled by AdvisorHub based on the time period from 12/31/22 - 12/31/23 (Source: AdvisorHub).
The AdvisorHub 2024 Advisors to Watch (A2W) rating produced by AdvisorsHub is based on industry experience, assets under management, revenue, growth, compliance records, professionalism, and other criteria. Investment performance is not a criterion. Self-completed survey was used for rating. The rating is not related to the quality of the investment advice and is based solely on the disclosed criteria. A2W winners are then ranked into subcategories based on scale, growth and professionalism with each winner being ranked into only one subcategory. The 100 Next Gen ranking is a subcategory of the AdvisorHub 2024 Advisors to Watch rating and does not denote an additional rating. 1987 wealth managers were considered for the rating; 1000 (50.3% of candidates) were named 2024 AdvisorHub Advisors to Watch.

The use of the CDFA® designation does not permit Wells Fargo Advisors or its Financial Advisors to provide legal advice, nor is it meant to imply that the firm or its associates are acting as experts in the field.