For Immediate Release :

Shore to Summit Wealth Management Welcomes Taeya Lauer as Partner and Senior Wealth Advisor

Bozeman, MT – September 15, 2025 – Shore to Summit Wealth Management, LLC is proud to announce the addition of Taeya Lauer as a new Partner and Senior Wealth Advisor, based in our new Seattle, WA office.

Scott L. Brown, CEO & Founding Partner, and Benjamin D. Spiker, COO & Founding Partner, shared their enthusiasm: "We are so pleased to welcome Taeya Lauer to the Shore to Summit Wealth Management practice. Taeya brings enormous energy, enthusiasm, and dedication to her clients. Her dedication to the art and science of investment planning is commendable."

Taeya Lauer, Partner & Senior Wealth Advisor, has spent her entire career guiding individuals and families through life's financial complexities. With a passion for planning, she pairs analytical precision with creativity to help clients pursue meaningful goals through customized strategies and thoughtful portfolio design.

With a B.A. in Finance and Decision-Making Sciences from Western Washington University, Taeya began her journey in financial services over three decades ago. Her experience spans key roles at institutions such as Washington Mutual Bank, Murphey Favre, D.A. Davidson & Co., and E.K. Riley Investments. In 2018, she founded Pacific Coast Financial Services, Inc., as CEO & Financial Advisor.

In September 2025, Taeya will take the next step in her professional journey by joining Shore to Summit Wealth Management, a Wells Fargo Advisors Financial Network practice as a Partner. She looks forward to collaborating with a team that shares her values of client-focused service, innovation, and continuous learning.

At the heart of Taeya's work is a deep respect for the uniqueness of each client's story. She thrives on the challenge of developing creative, tailored solutions and finds motivation in tracking measurable progress toward long-term financial success.

When she's not advising clients, Taeya is focused on her greatest role: being a mom to her son and daughter. Her personal life is just as dynamic as her career—from running and racing in triathlons to hiking, kayaking, surfing, and adventuring across the Pacific Northwest with her family and dogs. In quieter moments, she enjoys reading, yoga, and travel—and is always ready to say yes to her next adventure.

Shore to Summit Wealth Management is an independent, private client wealth management practice with headquarters in Bozeman, MT and Annapolis, MD, and offices in Florida, Mississippi, Washington, and Pennsylvania. With more than $3.4 billion in assets under management as of September 2025, the practice continues to grow rapidly. Our success is built on a client-first service model, which remains the foundation of everything we do.

For more information, visit: www.shoretosummitwm.com