For Immediate Release :

Shore to Summit Wealth Management Welcomes Joe Aley as Partner.

Bozeman, MT – October 3, 2025 – Shore to Summit Wealth Management, LLC is proud to announce the addition of Joe Aley as a Partner based in our new Portland, OR office.

Scott L. Brown, CEO & Founding Partner, and Benjamin D. Spiker, COO & Founding Partner, shared their enthusiasm: "We are so pleased to welcome Joe Aley to the Shore to Summit Wealth Management practice. Joe brings a wealth of experience, coupled with a warmth and depth of knowledge of the investment planning industry to his personalized client service model."

Joe Aley joins Shore to Summit Wealth Management with 22 years of experience, Joe Aley is a trusted financial advisor dedicated to helping individuals, business owners, and families achieve their goals through customized financial strategies while specializing in retirement planning and tax-efficient investment management.

Holding a BA in Finance from the University of Alaska-Anchorage, Joe's diverse background includes construction and operations on the Arctic Ocean and owning a tourism business on Alaska's Kenai Peninsula.

After relocating to Portland in 2002, he began his advisory career at RBC Dain Rauscher and founded Aley Wealth Management in 2007 with what is now Wells Fargo Advisors Financial Network. In October 2025, Joe merged his practice with Shore to Summit Wealth Management to better serve his national clientele with enhanced resources.

A proud father, Joe cherishes his adult son and daughter thriving locally in their lives and professions. He volunteers in the community, enjoys pets, cycling, camping, traveling, and cheering as a passionate sports fan. For 12 years, he's managed the Rose City Cardinals Baseball team to multiple city championship games. Recently, Joe embraced Bachata dancing reflecting his love for learning.

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