

## **FOR IMMEDIATE RELEASE**

### **Shore to Summit Wealth Management Expands Bethesda, Maryland Office; Welcomes Managing Directors Catherine Nicholas and Moshe Burstin**

Bozeman, MT — March 23, 2026 — Shore to Summit Wealth Management, LLC (STSWM) today announced the expansion of its Bethesda, Maryland office with the addition of Managing Directors Catherine Nicholas and Moshe Burstin. Together, the advisors bring more than 50 years of combined industry experience, strengthening the practice’s presence in the Mid-Atlantic region and expanding its ability to serve high-net-worth individuals and families.

“We’re thrilled to expand our presence in Bethesda,” said Scott L. Brown, CEO and Founding Partner of Shore to Summit Wealth Management.

“Catherine and Moshe bring deep experience, strong client relationships, and a shared commitment to the independent advisory model.”

Benjamin D. Spiker, COO and Founding Partner, added, “Advisors like Catherine and Moshe choose Shore to Summit because they value independence, true partnership, and the ability to deliver highly personalized advice to their clients. We are excited to welcome them to the team.”

### **Meet the New Advisors in the Bethesda Office**

#### **Catherine Nicholas: Managing Director – Investments**

Catherine Nicholas has spent more than 36 years helping clients build wealth, prepare for retirement, and design effective wealth transfer strategies. Known for her thoughtful guidance and strategic insight, she is recognized for helping clients navigate life’s most important financial decisions with clarity and confidence.

Her areas of focus include wealth management, retirement planning, investment strategy, liquidity and liability management, and long-term wealth planning. Catherine is widely valued for her ability to translate complex financial concepts into clear, actionable strategies tailored to each client’s

priorities. Her advisory philosophy emphasizes integrity, education, and long-term partnerships built on trust.

She serves a diverse client base of high-net-worth individuals, families, and professionals seeking disciplined guidance in managing and preserving their wealth.

Catherine joined Wells Fargo Advisors in 2009 and was recognized during her tenure as a member of both the President's Council and Platinum Council. She now joins Wells Fargo Advisors Financial Network with Shore to Summit Wealth Management as a Partner after 17 years with the firm.

She holds a Bachelor of Science degree in Marketing and Management Systems from the University of Maryland Global Campus.

Catherine lives in Bethesda, Maryland, with her husband, Aaron Baltimore. An avid equestrian, she maintains her primary office in Bethesda and a secondary office in Ocala, Florida.

Joining Catherine is Senior Registered Client Relationship Manager Christopher Venit and Registered Client Relationship Manager Julian Igbaroola.

### **Moshe Burstin, CFP®: Managing Director – Investments**

Moshe Burstin, CFP®, is a seasoned financial advisor with more than two decades of experience guiding clients through complex wealth management and investment planning decisions. He earned his degree in Psychology from Lafayette College, a foundation that informs his thoughtful, client-centered approach to financial decision-making.

Moshe began his career in 2001 at Legg Mason Wood Walker, Inc., where he developed expertise in portfolio construction, risk management, and long-term investment strategies. In 2006, he joined Wachovia Securities, a predecessor firm of Wells Fargo Advisors, where he continued to grow his advisory practice.

Today, Moshe is a Partner at Shore to Summit Wealth Management, a Wells Fargo Advisors Financial Network affiliate. As a CERTIFIED FINANCIAL PLANNER® professional, he provides disciplined, customized strategies designed to align with clients' long-term goals. He is known for his analytical rigor, integrity, and ability to translate complex financial concepts into practical guidance.

Born and raised in San José, Costa Rica, Moshe is fluent in Spanish and brings a strong cultural perspective to his work with a diverse client base. He has also served on the finance committees of local nonprofit organizations, supporting responsible stewardship and long-term sustainability.

Moshe lives in Maryland with his wife and two sons. Outside the office, he enjoys hiking, spending time outdoors, and being with his Golden Retriever.

Joining Moshe is Senior Registered Client Relationship Manager Christopher Venit.

*The Platinum Council distinction is held by a select group of Financial Advisors within Wells Fargo Advisors as measured by one or more of the following: completion of educational components, business production from the previous year, and professionalism. Additional consideration may have included best practices and team structure.*

## **About Shore to Summit Wealth Management**

Shore to Summit Wealth Management is an independent private wealth practice headquartered in Bozeman, Montana, with offices in Annapolis, MD; Bethesda, MD; Melbourne, FL; Naples, FL; Starkville, MS; Minersville, Hanover, and Cranberry Township, PA; Portland, OR; Seattle, WA; and St. Louis, MO.

With more than \$5 billion in assets under management as of March 2026, the practice continues to grow by delivering personalized, client-centered wealth management strategies built on long-term relationships and independent advice.

Learn more at: [www.shoretosummitwm.com](http://www.shoretosummitwm.com)

## **About Wells Fargo Advisors Financial Network**

For more than 25 years, Wells Fargo Advisors Financial Network, the independent contractor business model of 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.