

## **For Immediate Release:**

### **Shore to Summit Wealth Management Welcomes Lynn Van Moppes as Partner and Senior Financial Advisor**

**Bozeman, MT - June 10, 2026** - Shore to Summit Wealth Management is pleased to announce that Lynn Van Moppes has joined the practice as Partner and Senior Financial Advisor. Lynn brings three decades of experience serving individuals and families throughout the Pacific Northwest. Her practice has long been defined by trust, thoughtful guidance, and a deep commitment to understanding each client's goals and values.

Lynn began her career shortly after graduating from Seattle University. She partnered with a senior advisory team in 1997 and spent the next ten years building a practice centered on long-standing relationships. Over time, she became known for her ability to tailor investment strategies to each client's needs while helping them navigate broader financial decisions with clarity and confidence. Her biography notes that exceptional financial guidance requires understanding each client's unique goals, values, and vision for their future. That philosophy continues to guide her work today.

Her approach includes customized portfolio management as well as close collaboration with clients' estate attorneys and CPAs. She believes that comprehensive planning and white glove service are essential to delivering meaningful long-term outcomes. This dedication to high-touch, boutique-level care is what ultimately led her to join Shore to Summit. As her biography states, her commitment to white glove service was the catalyst in her decision to partner with the firm.

"We are thrilled to welcome Lynn to our partnership," said Scott Brown, CEO and Founding Partner. "Her experience, her client-first mindset, and her long-standing reputation in the Pacific Northwest make her an outstanding addition to our team. She reflects the values that define Shore to Summit, including trust, clarity, and a genuine dedication to the families we serve."

Benjamin D. Spiker, COO and Founding Partner added, "We are pleased Lynn chose Shore to Summit Wealth Management as she embarks on her journey as an independent advisor. Lynn recognized the support Shore to Summit provides financial advisors and knew she could feel comfortable at our practice for the long term."

Lynn is a Pacific Northwest native and lives in Kenmore, Washington with her husband, Jimmy, and their daughter. She enjoys golf, tennis, and boating on the Puget Sound. She and her family often take their Ranger Tug north to the San Juan Islands when time allows.

Lynn will continue serving clients throughout Washington and the broader region as part of Shore to Summit's growing advisory team.

### **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 June 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)

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