FOR IMMEDIATE RELEASE

Warren Capital Management Partners with Shore to Summit Wealth Management

Bozeman, MT – September 1, 2026 – Shore to Summit Wealth Management announced today that Warren Capital Management will be joining the practice, further strengthening Shore to Summit's national advisory presence, and supporting its long-standing commitment to thoughtful, relationship-driven financial guidance.

Warren Capital Management has built a distinguished reputation for providing clients with clarity, discipline, and personalized wealth management strategies. By joining Shore to Summit, the practice will gain access to expanded planning resources, a broader advisory network, and enhanced operational support, while preserving the client-focused approach that has defined its success.

"This partnership reflects the type of alignment we look for when growing Shore to Summit," said Scott Brown, Co-Founder and CEO of Shore to Summit Wealth Management. "Warren Capital Management has a long history of serving clients with clarity, care, and integrity. Joining forces allows us to support that work with deeper resources while remaining true to the principles that define both organizations." Said Ben Spiker, Co-Founder and COO of Shore to Summit Wealth Management.

Principal of the Warren Capital Management team is Sue Tompkins, Partner and Senior Financial Advisor, who has nearly 40 years of experience in wealth management, private banking, trust and estate administration, and investment planning. Throughout her career, Tompkins has specialized in serving affluent individuals and families, helping them navigate complex financial decisions through personalized guidance and strategic planning. Prior to establishing her own wealth management practice in 2019, she held leadership positions with Merrill Lynch, Harris Private Bank, and Bank of America. A Certified Public Accountant and respected community leader in Vero Beach, Florida, Tompkins is widely recognized for her expertise, professionalism, and commitment to client success.

"Throughout my career, I have been committed to building lasting relationships based on trust, personalized advice, and a deep understanding of each client's goals," said Sue Tompkins, Partner and Senior Financial Advisor. "Joining Shore to Summit provides us with additional resources and capabilities while allowing us to maintain the highly personalized service our clients have come to expect. I am excited about the opportunities this partnership creates for both our clients and our team."

As part of the transition, clients will continue working with their existing advisors and client service staff, with no disruption to current relationships, planning strategies, or investment management processes. Shore to Summit will guide the integration through its established onboarding framework, a structured, high-touch process designed to ensure a seamless advisor and client experience.

According to Chris Fiacco, Shore to Summit Managing Partner, the partnership reflects a shared vision for delivering comprehensive wealth management solutions while preserving the independence and personal relationships clients value most.

"Sue and the entire Warren Capital Management team have built an exceptional practice centered on client trust and long-term planning," said Chris Fiacco, Managing Partner of Shore to Summit Wealth Management. "Their depth of experience, commitment to fiduciary excellence, and dedication to serving clients make them a natural fit for Shore to Summit. We are thrilled to welcome them to the partnership and look forward to serving clients together for years to come."

The team will continue operating as Warren Capital Management, a Shore to Summit Wealth Management Partner, preserving the practices' established identity while benefiting from the resources and support of Shore to Summit's broader advisory network. Additional details regarding the transition will be communicated directly to clients as integration progresses.

About Shore to Summit Wealth Management

Shore to Summit Wealth Management is an independent private wealth management practice headquartered in Bozeman, Montana, and Annapolis, Maryland, with additional offices in Bethesda, Maryland; Melbourne, Naples, and Vero Beach, Florida; Starkville, Mississippi; Minersville, Hanover, and Cranberry Township, Pennsylvania; Portland, Oregon; Seattle, Washington; and St. Louis, Missouri.

With more than $6 billion in assets under management as of September 2026, the practice continues to grow by delivering personalized, client-centered wealth management strategies built on long-term relationships, independent advice, and a commitment to helping clients pursue their financial goals.

For more information, visit **www.shoretosummitwm.com**.

About Wells Fargo Advisors Financial Network

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