

For Immediate Release:

Industry Veteran Jimmy Dunn Joins Shore to Summit Wealth Management as Managing Principal

Bozeman, MT – September 18, 2026 – Shore to Summit Wealth Management is pleased to announce that Jimmy Dunn has joined the practice as a Managing Principal. Dunn brings more than three decades of distinguished industry experience to the practice, further strengthening the practice's wealth management capabilities.

Since beginning his financial services career in 1994, Jimmy has dedicated his energy to serving the complex, nuanced needs of affluent individuals, families, and businesses. He specializes in creating highly customized, comprehensive wealth management strategies designed to help clients grow, preserve, and efficiently transition their wealth. His areas of expertise include investment planning, strategic asset allocation, retirement planning—including specialized 401(k) strategies—and proactive portfolio management tailored to each client's evolving goals.

“We are thrilled to welcome Jimmy to our partnership,” said Scott Brown, CEO and Founding Partner. “Having spent over thirty years guiding clients through complex market cycles, Jimmy brings a rare depth of experience and a high-caliber perspective to our team. His absolute commitment to personalized, client-first wealth management aligns perfectly with the standards we hold at Shore to Summit.”

Benjamin D. Spiker, COO and Founding Partner, added, “Jimmy's reputation as both an exceptional advisor and a collaborative leader precedes him. His proven track record, particularly in leading and mentoring other advisors, makes him an incredible asset to our organization. As we continue to scale our operations and elevate the services we provide, Jimmy's leadership will be invaluable to our collective growth.”

Prior to joining Shore to Summit Wealth Management, Jimmy spent a decade with Wells Fargo Advisors, where he also served as the Branch Manager of the Annapolis office starting in 2016. In that leadership role, he championed a culture of excellence and integrity, mentoring fellow advisors and elevating the standard of care for clients across the team. He carries this same client first philosophy and commitment to high-quality, objective guidance into his partnership at Shore to Summit.

Jimmy earned his degree in Political Science from St. Mary's College of Maryland. He resides in Annapolis with his three daughters, Samantha, Piper, and CJ. Deeply rooted in his local community, Jimmy is actively involved in St. Mary's Parish and spends his free time coaching youth sports in local Annapolis leagues.

About Shore to Summit Wealth Management

Shore to Summit Wealth Management is a premier wealth management practice dedicated to providing comprehensive investment planning, investment management, and strategic advisory services to individuals, families, and business owners. With a focus on relationship-driven service, the firm helps clients navigate their financial journeys with clarity, confidence, and personalized care. 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 and independent advice.

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; Vero Beach, FL; Starkville, MS; Minersville, Hanover, and Cranberry Township, PA; Portland, OR; Seattle, WA; Kenmore, WA and St. Louis, MO.

Learn more at: www.shoretosummitwm.com

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