

## **Emerald Connect | shoretosummit\_homepage\_video**

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What I believe makes Shore to Summit special is the long standing relationships we have both within our team-- Ben Kelly and I have been together for two decades. And many of our clients have also been with us for two decades. And now they're like family.

We have a very diverse set of skills. I think that brings a lot of value to our client base. The client's not just getting one skill set or one mindset, they have access to everything that-- and every one that Shore to Summit has to offer.

Everyone, myself included, really enjoy going to work every day. We're very passionate about what we do. And we believe that our clients feel that passion, as well.

We think that Shore to Summit is unique-- offering two locations for clients to work with us, both in Bozeman, Montana, and Annapolis, Maryland. It allows us to serve a broader array of clients across the country. We can service them and access their businesses and their families a little more easily. And clients really value that.

As a team, we view our clients planning needs in a comprehensive manner. Whether it's saving for college, whether it's planning for retirement, or helping them out with liquidity events, we really try to take into account all the near-term hurdles that they might have, while helping them plan for the longer term-- still achieve those longer term goals.

We work with clients through all aspects of their lives. And many of our clients span multiple generations. A lot of our clients are successful entrepreneurs or corporate executives nearing retirement. And so when we take a look at their personal and unique situations, we want to take a holistic approach to wealth management. We're going to take into consideration not only their personal assets, but their professional assets.

And now they're at a point in their lives where they want to engage a family office experience, where it frees them to really explore their passions.

A key part of our client process is not just the what? But the who? Our clients have unique needs and preferences. We'd like to ensure that the client experience is actually tailored to them. Also, we are intimately familiar with, not only the client's long-term plan, but also, the practical day-to-day day details.

We could go on and on about the services that we deliver for our clients. And we could share numerous client success stories with you. However, what really drives us and motivates us to get up and go to work every day is knowing that if we do our jobs well that we change people's lives.

We talk to our clients every day. We get to know them personally. We're there when they have a baby. We're there when they get married. We're there, unfortunately, when they lose a loved one. We take all of that, not just to be supportive personally and emotionally, but also, it helps us be better financial advisors, to really understand the circumstances that they're dealing with. These are life events that are really what financial planning is all about.

Shore to Summit is ready to deliver the best possible service to our clients and to forge new relationships with those who desire to work with a team that cares about them as human beings, and in turn, will care about us as human beings, and more than just their financial advisor.