

## Shore to Summit Video Transcript

<Opening slides>

<Shore to Summit logo featured with opening, lighthearted music>

No one ever said wealth management had to be a difficult process.

In fact, it's about curating your life.

At Shore to Summit Wealth Management, we help our clients manage the complexities of growing wealth.

Through all stages of life – the planned and unplanned events, the exciting developments, the moments of loss, or the grind toward your goals – we're with you.

For each moment that affects your finances, we put you first.

Our mission is to help you reach your unique financial summit.

We're a tight-knit team of financial advisors and client support staff members. Our diversity of backgrounds and depth of knowledge help keep you on track toward your destination.

Each client receives institutional-quality advice through goal-based planning.

With us, wealth management doesn't have to be a burden.

Along your financial journey, why not enjoy the ride?

<Shore to Summit logo>

[shoretosummitwm.com](http://shoretosummitwm.com)

Investment products and services are offered through Wells Fargo Advisors Financial Network, LLC (WFAFN), Member SIPC. Shore to Summit Wealth Management is a separate entity from WFAFN. Shore to Summit Wealth Management is located at 105 E. Oak Street, Unit 1A Bozeman, MT 59715 # 406-219-2900. CAR-1022-04342