SHORE TO SUMMIT
WEALTH MANAGEMENT

LOGUE
FINANCIAL GROUP
A SHORE TO SUMMIT
WEALTH MANAGEMENT PARTNER

For Immediate Release:

Shore to Summit Wealth Management announces a new Wealth Management Practice joining with an office in Hanover, Pennsylvania. Shore to Summit introduces Logue Financial Group: a Shore to Summit Wealth Management Partner.

Bozeman, MT – October 30, 2023:

The Logue Financial Group: a Shore to Summit Wealth Management Partner is joining Shore to Summit Wealth Management LLC, following a successful career operating as Logue Financial Services under Lincoln Investment.

Scott Brown and Ben Spiker Co-founders of Shore the Summit Wealth Management, LLC had this to say about the Logue Financial Group joining the team, "We are thrilled to partner with this exceptional multi-generational team of professionals." – Scott Brown, CEO & Founding Partner and Ben Spiker, COO & Founding Partner.

Patrick T. Logue spent ten years teaching and coaching, Pat left the educational field and went full time into the financial industry. He has been a licensed investment advisor for over 40 years. Pat started Logue Financial Services in 1990, brokering his investments through Lincoln Investment. In addition to servicing his own clients, he has served as Branch Manager for his office in Hanover, PA for the past 32 years.

Mr. Logue earned his BA in Psychology and BS in Secondary Education from Edinboro University, in Edinboro, PA where he was a member of the nationally ranked cross country and track teams. After college he taught and coached at Sandusky City Schools in Sandusky, OH. While in Ohio he completed his master's degree in guidance and counseling from the University of Toledo. He was inducted into the Sandusky Hall of Fame as a Coach for his achievements with the cross country and track teams.

Pat has been married to his college sweetheart, Karen, for 45 years. They are both highly active and giving to the local community. Especially important to them are youth activities and sports. Mr. Logue looks forward to the new partnership with Shore to Summit to continue to assist clients in achieving their financial goals. He is proud to have his two sons, Ryan Logue, and Sean Logue, as his Partners at the Hanover, PA branch of Logue Financial. Ryan and Sean will join Pat in the transition to Shore to Summit Wealth Management and this will ensure all clients continuity with the practice and an eventual succession plan.

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Ryan Logue is a financial advisor with over 20 years' experience in the financial services industry. Ryan has spent the last 4 years with Lincoln Investment. Prior to Lincoln Investment, he spent 16 years with Morgan Stanley in the Private Wealth Management department. He has spent most of his career focused on investing in both public and private opportunities on behalf of individual investors. He holds Series 7, 31, 63, and 65 securities registrations. Ryan graduated with an MBA from Columbia University and a BA from Colgate University. Ryan has previously served on the board of the Columbia Alumni Association of Fairfield County. Ryan is married with three boys and spends his free time shuttling them around their various sports teams.

Sean Patrick Logue, Partner, is an accomplished CERTIFIED FINANCIAL PLANNER™ professional with 18 years of experience in finance. After graduating from Colgate University with degrees in English and Classical Studies, he began his career as a municipal bond consultant at Orrick, Herrington, Sutcliffe in New York City. He later joined Morgan Stanley's CFO reporting group.

In 2011, Mr. Logue returned to his hometown, Hanover, PA, and joined Lincoln Investment. In 2014, he earned the CERTIFIED FINANCIAL PLANNER™ practitioner designation. Throughout his tenure, he excelled, achieving recognition as a top advisor. He holds Series 7, 63, and 65 securities registrations. Beyond finance, Mr. Logue is an active community member who enjoys coaching basketball. In his leisure time, he enjoys golf and quality moments with his wife, Michaela, their daughter, Georgia, and their three beloved dogs.

About Shore to Summit Wealth Management:
Shore to Summit Wealth Management is an independent, private client practice based in Bozeman, MT and Annapolis, MD. Shore To Summit is dedicated to helping clients manage the complexities that come along with growing wealth. A client-first service model is the foundation and driving force behind the company.

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