



# SHORELINE

WEALTH MANAGEMENT  
*Your Financial Anchor®*

## ANCHOR YOUR FUTURE: DISCOVER YOUR INDEPENDENCE

Are you searching for unparalleled independence, enhanced compensation, and a seamless transition for your clients? Our supportive team ensures that you have access to the best tools, technology and insights to thrive with our firm. **Enhance your career, broaden your horizons, and grow with Shoreline Wealth Management.**

### INDEPENDENCE INCLUDES...

**Ownership in Your Book of Business** – At Shoreline, we recognize the dedication you've put into building your client base, and we believe it's time for you to truly own it. Build immediate equity in yourself and your practice.

**You are empowered** – Marketing Consultant, CFO and Business Strategist firm-level support. Compliance-approved social media posts and email communications.

**Your clients are empowered** – We support clients through education and simplifying financial planning, so they can focus on achieving their goals.

**Advisor-Centric Culture** – As an independent firm, our culture is shaped by our advisors, fostering a mutually beneficial environment rooted in our shared success.

### SHORELINE TECH PLATFORMS

Access these tools and more to provide best-in-class service to clients:

- RingCentral:** Wifi calling and video conferencing
- MyRepChat:** Compliant text messaging and reminders
- WealthVision:** Financial planning through eMoney software
- ScheduleOnce:** Online scheduler for client & prospects
- ThompsonOne:** Real-time market data, tickers & news
- RedTail:** Client Relationship Management platform to track client activities and team assigned tasks

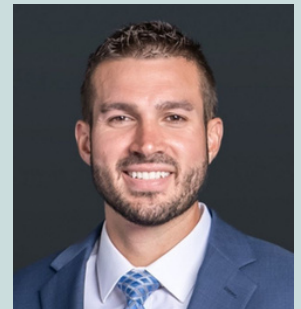
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## JOIN A TEAM THAT DELIVERS A PERSONALIZED CLIENT EXPERIENCE



**David F. Crossan,**  
CFP®, CLU®, CRC®\*  
Managing Partner



**John P. Stephens Jr.**  
Managing Partner

**Brittany L. Forte, FPQP**  
Registered Client Relationship Manager

**Elizabeth Kandle**  
Head of Business Development

**Jessica Adams**  
Client Services Associate

**Manchester Office**  
2915 Ridgeway Road  
Suite B  
Manchester, NJ 08759  
732-902-7880

**Manahawkin Office**  
703 Mill Creek Road,  
Suite D  
Manahawkin, NJ 08050  
609-710-5561

**Contact**  
info@ShorelineWealth.com

**shorelinewealth.com**