

CAREER

Fidelity Investments · Regional VP, Fidelity Charitable (11 states, 35+ investor centers)

Fidelity Investments · VP–Financial Consultant

Earlier roles · Business development, branch relationship management & private client services

CREDENTIALS

Series 65 · Uniform Investment Adviser Law

Insurance License · Utah

HOW TIM CAN HELP

Charitable giving strategies

Donor-advised funds

Charitable trusts & endowments

Legacy & multigenerational giving

Global impact strategies

Wealth & financial planning

Business development & client relationships

EDUCATION

Westminster University

Financial Services, Economics, Financial Analysis & Investments

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Tim Shumway

VICE PRESIDENT, PHILANTHROPY

ROLE ON THE FAMILY OFFICE TEAM

As Vice President, Head of Philanthropy on the Summit Global Family Office team, Tim helps each family connect its wealth to the causes it cares about most, with tax-efficient, well-organized giving that spans generations.

BACKGROUND

Tim brings more than 35 years of experience serving individuals and families, much of it with Fidelity Investments. As Regional Vice President, he led Fidelity Charitable efforts across 11 states and more than 35 investor centers, partnering with hundreds of financial consultants and their clients to advance charitable giving through seminars, client events, and charitable planning strategies.

Before that, Tim served as a Vice President–Financial Consultant at Fidelity, delivering comprehensive financial planning and investment management to a select group of wealthy individuals and families. Since joining Summit Global in 2025, he has focused on guiding family wealth priorities and relationships across generations.

GIVING THROUGH A DONOR-ADVISED FUND (DAF)

What a DAF is: A simple, flexible way to give. Donors contribute cash or appreciated assets, receive an immediate tax deduction, and recommend grants (gifts) to the charities they care about over time.

How Tim helps: Tim guides families through every step: selecting IRS-qualified charities, recommending and timing grants, and investing in the fund so it can grow tax-free for greater impact.

CLIENT PHILOSOPHY

> *Generosity today. Legacy tomorrow. Connected forever.*

Tim teaches families to give together and invest in the generations ahead. For Tim, it is all about family, connecting, and helping others.

FAMILY & INTERESTS

Tim and his wife are the parents of seven children and grandparents of six. Away from the office, he loves being with his family, officiates high school varsity basketball, and is an avid golfer. For Tim, golf is a journey shared in fellowship.

SUMMITGLOBAL FAMILY OFFICE

Global Advisory | Family Office Services | Private Advisory

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