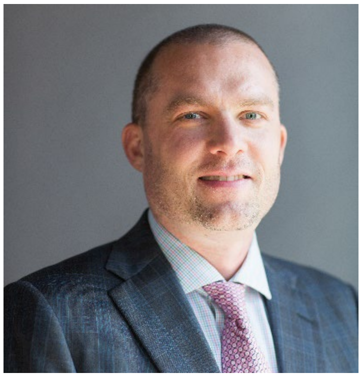
LAKESIDE
WEALTH MANAGEMENT



Aaron Adcock
Director of Wealth Management Division
CWS©, C(k)P©

Lakeside Wealth Management is a team of experienced professionals who collectively manage over $1.73 Billion on behalf of institutions, corporations, and private clients.

Aaron Adcock, Director of Wealth Management Division, has over 15 years of experience in the finance industry. Aaron educates, mentors, and trains the next generation of Lakeside advisors to become leaders in the industry. He is responsible for coordinating training and continuing education for advisors, as well as, making sure we hold important and current industry designations. For our private wealth division, Aaron handles complex financial planning and strategizing that aligns with our client's financial goals. As the director of his division, Aaron is also responsible for making sure his team meets and exceeds annual firm goals.

Prior to his work at Lakeside, Aaron was a Financial Consultant at Charles Schwab in Richfield, Ohio. He also served as a Financial Advisor at Morgan Stanley.

Personal Accolades

- Rebuilding Together Duneland Volunteer
- United Way Day of Caring Volunteer
- Garden Volunteer at the Duneland Family YMCA
- Strong Supporter of the Boys and Girls Clubs of Greater NWI

Education & Personal Development

- Purdue University North Central, B.S. Business Management
- Securities Registered Series 31, 66, 7, Licensed in Life Insurance
- Certified Wealth Strategist (CWS)©
- Certified 401(k) Professional (C(k)P)©

Company Information

- 38 full time team members
- 20 licensed and registered advisors

Company Accolades

- Named to the Invest in Other's National Charitable Champions List – 2019
- RIA Channel Top 100 Wealth Managers List - 2019
- Named to the Best Places to Work in Indiana List – 2015-2019
- Financial Times Top 300 Registered Investment Advisors – 2018 and 2019
- Named to the NAPA Top DC Advisor Firm list - 2017
- Named as a finalist for Invest in Other's Corporate Philanthropy Award - 2016
- #9 on Forbes's Fastest Growing RIA's List - 2013
- Given over $1 Million to local nonprofits since 2006 along with over 3,300 hours of community service in 2018 alone

Headlines :

- Connoisseur of Craft Beer
- Hot-Rod Addict
- Winning Little League Coach
- Fixer Upper Handyman Extraordinaire
- Extreme Camper
- Office "Deal of the Week" Coordinator

" To educate and enable Lakeside clients to achieve financial confidence through a process aligned with their values . "