



**Amanda Calvert**  
Operations  
Coordinator,  
Retirement Plan  
Division

## Headlines:

- Pet Lover
- Part-Time Photographer
- DIY Creationist
- 5K Running Enthusiast
- Passionate about the It's a Pittie Rescue Organization
- Mommy to a music loving little girl

Lakeside Wealth Management is a team of experienced professionals who manage over \$1.3 Billion on behalf of institutions, corporations, and private clients.

Amanda Calvert, Operations Coordinator - Retirement Plan Division, started her career with Lakeside as the Client Relations Associate. After assisting the Retirement Plan Division with several projects, Amanda began a complete role transition, landing in her current position inside the division. Her primary focuses include preparing committee review material, coordinating plan level reporting, finalizing meeting notes and following up on plan level action items. Amanda is responsible for collaborating with the operations team to develop innovative processes that create efficiencies within the division.

Prior to joining the Lakeside team, Amanda spent seven years in the retail industry. She is also a licensed cosmetologist and dabbles in photography in her spare time.

### Personal Accolades

- Race Volunteer
- United Way Day of Caring Volunteer
- Open Arms Animal Rescue Supporter
- Avid Supporter of the It's a Pittie Rescue Organization
- Rebuilding Together Duneland Volunteer

### Education & Personal Development

- Purdue University North Central
- Excel Academies of Cosmetology

### Company Information

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

### Company Accolades

- Named to the Best Places to Work in Indiana List - 2015-2018
- Financial Times Top 300 Registered Investment Advisors - 2018
- 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 The Forbes's Fastest Growing RIA's - 2013
- Finalist for Small Business of the Year - 2009 & 2010
- Given over \$1 Million to local nonprofits since 2006 along with over 3,500 hours of community service in 2017 alone

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