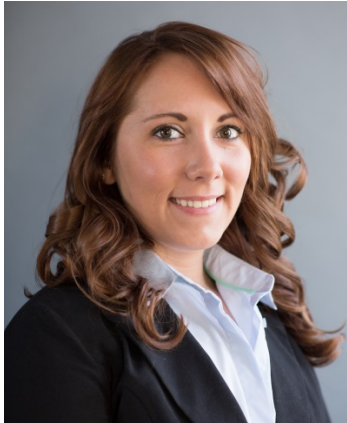




LAKESIDE

WEALTH MANAGEMENT



Amanda Calvert,
QKA
Operations
Coordinator,
Retirement Plan
Division

Headlines:

- Pet Lover
- Part-Time Photographer
- DIY Creationist
- 5K Running Enthusiast
- Passionate About All Things Animal Rescue
- Mommy to a Music Loving Little Girl and Wildly Adventurous Little Boy

Lakeside Wealth Management is a team of experienced professionals who collectively manage over \$1.73 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 as operations coordinator. Her primary focuses include preparing committee review material, coordinating plan level reporting, helping to oversee plan implementation 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 Lakeshore PAWS
- Rebuilding Together Duneland Volunteer

Education & Personal Development

- Purdue University North Central
- Qualified 401(k) Administrator (QKA)
- Excel Academies of Cosmetology

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

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

Investment Advisor Representatives offer services through Lakeside Wealth Management Group, LLC. Registered Representatives offer securities through First Allied Securities, Inc. A Registered Broker/Dealer Member FINRA/SIPC. Lakeside Wealth Management Group, LLC. and First Allied Securities, Inc. are not affiliated companies.