



## LAKE SIDE

WEALTH MANAGEMENT



**Amanda Herren**  
Director of HR &  
Technology

### Headlines:

- Technology Guru
- Hockey Fanatic
- Mama of two Disney loving boys
- Obsessed with all Things Pasta
- Repurposing Master

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

Amanda Herren, Executive Assistant to the CEO and HR Coordinator wears several different hats for the Lakeside team. Her primary focus is scheduling and maintaining the CEO's day to day and travel schedules. Her HR duties include developing processes around new employee onboarding and training, coordinating and maintaining employee files and serving as a benefits liaison to the team. Her technology duties include research and implementation of new applications, electronics, and resources for the team. She also troubleshoots IT issues and coordinates technology support from our local IT agency.

Prior to her work at Lakeside, Amanda spent over nine years in management beginning with her position as a Store Manager for AT&T Mobility. She also served as a Sales Manager for U.S Cellular and a Sales Executive for Fidelity National Title.

### Personal Accolades

- Co-Chair of the Boys and Girls Club of Porter County's Golf Outing
- United Way Day of Caring Volunteer
- Rebuilding Together Duneland Volunteer
- Ice Skating Instructor for Valparaiso Parks Department
- Member of Kiwanis International
- Member of the Society for Human Resource Management (SHRM)
- Paul Harris Fellow Award Winner – 2014

### Education & Personal Development

- Purdue University, B.S. Human Resource Management
- OSHA Certified
- CPR Certified

### 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. ”