



## LAKESIDE

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 collectively manage over \$1.73 Billion on behalf of institutions, corporations, and private clients.

Amanda Herren, Director of HR/Technology and Executive Assistant to the CEO, wears several different hats for the Lakeside team. Her primary focus includes 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. Since joining the team in 2013, Amanda has also served as the right-hand woman to Lakeside's CEO, Mark Chamberlain.

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

- Partners in Servant Leadership Mentor for Purdue Northwest
- Class of 2018 Top 20 Under 40 - NWI Times
- United Way Day of Caring Volunteer
- Rebuilding Together Duneland Volunteer
- 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

### 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. ”