



**Anisha Curless**  
Executive Assistant  
Participant Education  
Coordinator

## Headlines:

- Hiking Enthusiast
- Summer Girl
- Animal Lover
- Mommy to a Mickey Loving Toddler
- Chicago Bulls Fanatic
- Lover of All Things Spicy

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

Anisha Curless, Executive Assistant and Participant Education Coordinator, began her career at Lakeside as a Client Services Associate. Shortly after she started, Anisha transitioned into her role as Executive Assistant to Lakeside's Senior Vice President, Tim VerSchure. Anisha's main focuses include preparing meeting notes, time management, and completing expense reports. Today, her role also includes Participant Education Coordinator, adding organizing and scheduling enrollment and committee meetings and facilitating presentation preparations for advisors to her list of duties. Anisha serves as a liaison and assists with program details and coordination inside Lakeside's partnership with The Plan Sponsor University.

Prior to joining the Lakeside team, Anisha spent over 8 years in retail management. Her work with Aeropostale and Puma won her national awards in the retail management industry. In her spare time, Anisha enjoys spending time with her husband and two dogs.

### Personal Accolades

- Comcast Day of Caring Volunteer
- Michiana Humane Society Supporter
- United Way of Day of Caring Volunteer
- Rebuilding Together Duneland Volunteer
- Mixed Up Mutts Volunteer
- Assistant Committed to Excellence Award Winner - 2012

### Education & Personal Development

- Purdue University North Central, B.A. Liberal Arts
- 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. ”