



## LAKE SIDE

WEALTH MANAGEMENT



**Anisha Curless**  
Executive Assistant  
Participant Education  
Coordinator

### Headlines:

- Hiking Enthusiast
- Summer Girl
- Animal Lover
- Fun Loving Mommy to Two Sweet-Hearted Little Boys
- Chicago Bulls Fanatic
- Lover of All Things Spicy

Lakeside Wealth Management is a team of experienced professionals who collectively manage over \$1.73 Billion on behalf of institutions, corporations, and private clients.

Anisha Curless, Executive Assistant and Participant Education Coordinator, began her career at the “front of the house” for Lakeside as the Client Services Associate. Shortly after she started, Anisha was given the opportunity to step into a new role as Executive Assistant to Lakeside’s Senior Vice President, Tim VerSchure. Anisha’s main focuses include preparing meeting notes, managing multiple schedules, and completing expense reports. Anisha also serves as Lakeside’s Participant Education Coordinator, which adds organizing and scheduling enrollment and committee meetings, preparing advisor presentations and assisting in the onboarding process for all new qualified plans, to her daily duties.

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
- Strong Supporter of Lakeshore PAWS
- Assistant Committed to Excellence Award Winner - 2012

#### Education & Personal Development

- Purdue University North Central
- CPR 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. ”