



**William Howard**  
Operations  
Coordinator Private  
Wealth Division

## Headlines:

- Home Rehab Doctor
- Avid Golfer
- Professional Grandfather of Six
- Landscape Extraordinaire
- Mexican Food Fanatic
- Director of the Office Lottery Pool

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

William "Bill" Howard, Operations Coordinator – Private Wealth Division, has over 40 years of experience in the finance industry. Beginning his career as a Financial Advisor, Bill now focuses on educating and training Lakeside's up and coming advisors. Bill's expertise falls in the tax arena, spending time researching and trouble-shooting client's tax questions as well as reviewing and troubleshooting annuity and life insurance issues.

Prior to his work at Lakeside, Bill fulfilled roles with other wealth management firms in the area. He has also owned a tax preparation service for several years.

### Personal Accolades

- Home Assessor for Rebuilding Together Duneland
- Rebuilding Together Duneland Workday Volunteer
- United Way Day of Caring Volunteer
- Strong Supporter of the Share Foundation

### Education & Personal Development

- Purdue North Central – Business
- Licensed in Health Insurance
- 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. ”