



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 collectively manage over \$1.73 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

- Rebuilding Together Duneland Workday Volunteer
- United Way Day of Caring Volunteer
- Strong Supporter of the Share Foundation
- Strong Supporter of the Boys and Girls Clubs of Greater NWI

Education & Personal Development

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