LAKESIDE
WEALTH MANAGEMENT

Chris Frain
Financial Advisor
CWS®, CRPS®, C(k)P®

Headlines :

• Sports Fanatic
• Avid Golfer
• Big City Adventurist
• US Traveler
• Film Critic

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

Chris Frain, Financial Advisor, serves Lakeside clients in both the Retirement Plan Division and the Private Wealth Division. Chris specializes in retirement planning for administrators, teachers and staff in our local school corporations. This includes evaluating pensions and educating clients on their 403(b), 401(a), 457 or VEBA plans. Inside the Retirement Plan Division, Chris assists in plan design, plan review and participant education while his focus inside the Private Wealth Division includes walking his clients through the retirement planning journey and helping them transition into life after retirement.

Prior to becoming a Financial Advisor at Lakeside, Chris worked as an advisor for Ameriprise Financial in Minneapolis, Minnesota.

Personal Accolades

- Rebuilding Together Duneland Volunteer
- Annual Junior Achievement Volunteer
- United Way Day of Caring Volunteer
- Black Diamond Award Winner - 2012
- Habitat for Humanity Volunteer - 2010
- Member of the Delta Chi Fraternity

Education & Personal Development

- University of Iowa – B.S Finance
- Securities Registered Series 7, 63, 65, and Licensed in Insurance
- Certified Wealth Strategist (CWS) ©
- Certified Retirement Plan Specialist (CRPS®)
- Certified 401(k) Professional (C(k)P) ©

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 . ”