LAKESIDE
WEALTH MANAGEMENT

Cory Helmbrecht

Financial Advisor, CWS®

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

Cory Helmbrecht, Financial Advisor, began his career in finance even before graduating from Purdue North Central. Cory serves as an advisor in Lakeside's private wealth division. He is responsible for organizing and preparing client meetings, following up with client tasks, and researching strategies to help his clients along their financial journey. As one of the younger advisors in the office, Cory focuses on educating and advising a younger client base, stressing the importance of saving now rather than later. When needed, Cory also assists the retirement plan division with participant enrollment meetings and committee presentations.

Prior to joining the Lakeside team, Cory spent three years with Fifth Third Bank as a Personal Banker, responsible for performing audits, managing team members, measuring operational performance, and performing analysis on newly opened accounts across the Northwest Indiana Region.

Headlines :

- Avid Outdoorsman
- Kayaking Adventurist
- US and World Traveler
- Foodie Extremist – Tries Any Type of Food at Least Once
- Biking Enthusiast

Personal Accolades

- United Way Day of Caring Volunteer
- Kids Alive International Supporter
- Rebuilding Together Duneland Volunteer
- NWI Paddler Association Supporter
- Shirley Heinze Land Trust Supporter
- Member of Sigma Beta Delta Honors Society

Education & Personal Development

- Purdue University North Central, B.S. Economics and Marketing
- Securities Registered Series 7, 66

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 . ”