



## LAKESIDE WEALTH MANAGEMENT

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



**Cory M.  
Helmbrecht**  
Financial Advisor,  
CWS®

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.

### Personal Accolades

- Member of the Boys and Girls Clubs of Greater Northwest Indiana PALS Program
- United Way Day of Caring Volunteer
- Kids Alive International Supporter
- Rebuilding Together Duneland Volunteer
- NWI Paddler Association Supporter
- Shirley Heinze Land Trust Supporter

### Education & Personal Development

- Purdue University North Central, B.S. Economics and Marketing
- Securities Registered Series 7, 66
- Certified Wealth Strategist (CWS)®

### 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

## Headlines:

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

To educate and enable Lakeside clients to achieve financial confidence through a process aligned with their values. ”

Investment Advisor Representative offering services through Lakeside Wealth Management Group, LLC Registered Representative offering securities through First Allied Securities, Inc. A Registered Broker/Dealer Member FINRA/SIPC Lakeside Wealth Management Group, LLC and First Allied Securities, Inc. are not affiliated companies. Check the background of this investment professional on FINRA's BrokerCheck website: <http://brokercheck.finra.org>