



LAKE SIDE

WEALTH MANAGEMENT



Elizabeth A. Adcock
Director of Strategic Development

Headlines:

- Twin Mommy
- Passionate for the YMCA Mission
- Accomplished Pianist
- Lover of All Things Vintage
- Known at Lakeside as "The Enforcer"

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

Elizabeth Marks, Director of Strategic Development, has over 15 years of experience in the finance industry. She began her career at Lakeside Wealth Management in 2010 in operations and client services. Today, Elizabeth leads the merger and acquisition department for Lakeside, helping to transition new advisors, business owners, and clients into the Lakeside culture. Elizabeth also focuses on our custodial relationships with Pershing Advisor Solutions and TDA and oversees marketing for the firm.

Prior to joining the Lakeside team, Elizabeth spent three years as a leading Sales Specialist for Unicus Marketing.

Personal Accolades

- Duneland Chamber Volunteer of the Year Award - 2019
- Named to the NWI Times 20 Under 40 Class for 2019
- Executive Board Vice President for the Duneland Family YMCA
- Co-Chair for the Chairman's Round Table – Duneland Family YMCA since 2016
- Rebuilding Together Duneland Volunteer
- United Way Day of Caring Volunteer
- Former Committee chair for Duneland YMCA's Dancing Like the Stars
- Former Secretary of the Board of Executive Directors for the Duneland YMCA
- Paul Harris Rotarian Award Winner - 2014
- Valparaiso Leadership Graduate - 2010

Education & Personal Development

- Valparaiso University, B.A. Marketing

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. ”