



Elizabeth A. Marks
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 manage over \$1.3 Billion on behalf of institutions, corporations, and private clients.

Elizabeth Marks, Director of Strategic Development, has over 10 years of experience in the finance industry. She began her career at Lakeside Wealth Management in 2010 as an assistant to the CEO. Today, Elizabeth leads the merger and acquisition department for Lakeside, helping to transition new advisors, business owners, and clients into the Lakeside model. Elizabeth also oversees the operations for the private wealth division and the marketing for both private wealth and retirement plan divisions. She serves as a liaison between the advisors and support staff to improve communication and processes with client accounts.

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

Personal Accolades

- Executive Board Member at Large for the Duneland Family YMCA
- Co-Chair for the Chairman's Round Table – Duneland Family YMCA since 2016
- Committee chair for Duneland YMCA's Dancing Like the Stars – since 2017
- Former Secretary of the Board of Executive Directors for the Duneland YMCA
- Rebuilding Together Duneland Volunteer
- United Way Day of Caring Volunteer
- Paul Harris Rotarian Award Winner - 2014
- Valparaiso Leadership Graduate - 2010

Education & Personal Development

- Valparaiso University, B.A. Marketing
- CPR Certified

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 and 2018
- 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. ”