



Jennifer Fultz
Compliance
Coordinator/
Executive Assistant

Headlines:

- Fisher-Woman Extraordinaire
- Crocodile Hunter Steve Erwin's #1 Fan
- Office Fitness Coordinator
- Cooking Enthusiast
- Obsessor of Sunflower Seeds
- Holds the record for most 5k's ran during the winter months at Lakeside

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

Jennifer Fultz, Compliance Coordinator and Executive Assistant, began her career at Lakeside as a receptionist over five years ago. Before the completion of her first year at Lakeside, she moved to her current role as Executive Assistant for Lakeside's CCO. In 2016, Jen expanded her role to include Compliance Coordinator. Jen's main responsibilities include organizing and maintaining executive schedules, preparing for annual audits, updating and communicating changes to employee processes, submitting and filing all compliance documents, and assisting with human resource responsibilities with new employees. Jen serves on the transition team for Lakeside, assisting with onboarding new team members.

Prior to joining Lakeside's team, Jen was a Caregiver at Portage Child Care Center. She graduated from Purdue University, North Central in December 2015 with a degree in Human Resources.

Personal Accolades

- Treasurer for the NWI Ruby Football Club
- Coordinator for the annual Ruck-and-Run 5K for the NWI Ruby Football Club
- Fundraising Secretary for the NWI Ruby Football Club - 2017
- United Way Day of Caring Volunteer - 2015 and 2016
- Volunteer for Rebuilding Together Duneland 2012-2015
- OSHA Certified
- CPR Certified

Education & Personal Development

- Purdue University, North Central - B.S Human Resources - December 2015
- Purdue University, North Central - Associate's Degree Organizational Leadership & Supervision with a concentration in Human Resources - 2014

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. ”