



LAKE SIDE

WEALTH MANAGEMENT



Jennifer Fultz Compliance Coordinator/ Executive Assistant

Headlines:

- Affectionately known as the Office Cat Lady
- Crocodile Hunter Steve Irwin's #1 Fan
- Office Fitness Coordinator
- Cooking Enthusiast
- Self-Proclaimed "Fake IT Support"
- Lover of All Animals and Vegan Extraordinaire

Lakeside Wealth Management is a team of experienced professionals who collectively manage over \$1.73 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 as well.

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

- Strong Supporter of the Feline Community Network
- United Way Day of Caring Volunteer
- Volunteer for Rebuilding Together Duneland
- Former Treasurer for the NWI Ruby Football Club
- Fundraising Secretary for the NWI Ruby Football Club - 2017
- 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

- 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. ”