LAKESIDE
WEALTH MANAGEMENT

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

Jennifer San Fillippo, Vice President, joined the Lakeside Team in 2017 bringing more than 25 years of industry experience with her. Jennifer's focuses include servicing her clients in retirement plan design, corresponding tax law, financial advisory and fiduciary and participant services.

Prior to joining the Lakeside team, Jennifer served as vice president of La Bri Group for 14 years while also serving as president of La Bri Group Retirement Services for 7 years. When she is not in the office, Jennifer enjoys traveling and spending time with her husband and four children.

Jennifer San Fillippo
Vice President
C(k)P©, QPFC

Headlines :

- Green Bay Packers Fanatic
- World Traveling Explorer
- Famous for crazy family Christmases
- Book Worm
- History Buff

Personal Accolades

- NAPA Top Women Advisor All-Star – 2015, 2016, 2017, 2018
- Retirement Plan Advisor of the Year Finalist - 2010
- Member of the American Society of Pension Professional and Actuaries
- Former president of the Wisconsin Retirement Plan Professionals Ltd.
- Strong supporter of the World Vision charities and National Christian Foundation

Education & Personal Development

- Cardinal Stritch University, Magna Cum Laude, B.S. Business Administration
- John Marshall Law School – Employee Benefits Law
- FINRA Series 7 & 66 and Licensed in Wisconsin Life Insurance
- Certified 401(k) Professional (C(k)P) ©
- Qualified Plan Financial Consultant (QPFC)

Company Information

- 38 full time team members
- 19 licensed 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."