



## LAKE SIDE

WEALTH MANAGEMENT



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

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 San Fillippo, Vice President, joined the Lakeside Team in 2017 bringing more than 30 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.

### Personal Accolades

- Named to the NAPA Top Women Advisor List – 2015-2019
- Retirement Plan Advisor of the Year Finalist - 2010
- Member of the American Society of Pension Professional and Actuaries
- Strong Supporter and Volunteer for SteetLife Communities
- Advocate for Shorehaven Elder Care Facility
- 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 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

## Headlines:

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

“ To educate and enable Lakeside clients to achieve financial confidence through a process aligned with their values. ”

Investment Advisor Representative offering services through Lakeside Wealth Management Group, LLC Registered Representative offering securities through First Allied Securities, Inc. A Registered Broker/Dealer Member FINRA/SIPC Lakeside Wealth Management Group, LLC and First Allied Securities, Inc. are not affiliated companies. Check the background of this investment professional on FINRA's BrokerCheck website: <http://brokercheck.finra.org>