



**Jocelyn Hibshman**  
Chief Compliance  
Officer  
Long-Term Care  
Planning Specialist  
CLTC®

## Headlines:

- Avid Snow Skier
- World Traveler
- Professional Mom of Two
- Ballroom Dancing Extraordinaire
- Passionate Caregiver
- Office Recycling Officer

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

Jocelyn Hibshman, Chief Compliance Officer and Long Term Care Planning Specialist, has been with Lakeside for over 10 years. Jocelyn's wide array of responsibilities include handling the firm's finances, establishing and implementing business strategies, and ensuring the firm meets and exceeds all compliance guidelines.

Prior to joining the Lakeside team, Jocelyn spent over 7 years in the sales industry. She is a Chesterton, Indiana native and is very active inside the community with which she lives, works, and plays.

### Personal Accolades

- Board Member – Housing Opportunities
- Committee Member - Duneland YMCA, Dancing Like the Stars
- Past President, Rebuilding Together Duneland – 2006-2016
- Ten Year Rebuilding Together Duneland Board Member
- Supporter of the Shirley Heinz Land Trust
- Duneland Chamber of Commerce Humanitarian of the Year - 2014
- Up and Coming Influential Woman of Northwest Indiana - 2013

### Education & Personal Development

- Purdue University, Bachelor of Arts
- Securities Registered Series 24, 51, 65, 7, 63
- Long-Term Care Planning Specialist (CLTC®)

### 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. ”

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>