



LAKE SIDE

WEALTH MANAGEMENT



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
- Passionate About the Plant Based Life!

Lakeside Wealth Management is a team of experienced professionals who collectively manage over \$1.73 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 15 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

- Executive Board Member and Secretary of the Board – Housing Opportunities
- Supporter of the Shirley Heinz Land Trust
- Former Committee Chair - Duneland YMCA, Dancing Like the Stars
- Past President, Rebuilding Together Duneland – 2006-2016
- Ten Year Rebuilding Together Duneland Board Member
- 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

- 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. ”

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>