



## LAKE SIDE

WEALTH MANAGEMENT



**John Masterson**  
Retirement Plan  
Consultant  
AIF®, QPFC®, C(k)P®

### Headlines:

- Warm Weather Fan
- Professional Spectator for his Sons' Sports
- City Kind of Guy
- Will Eat Anything with BBQ Sauce
- Big Cubbies Fan – Go Cubs Go!

Lakeside Wealth Management is a team of experienced professionals who collectively manage over \$1.73 Billion on behalf of institutions, corporations, and private clients.

John Masterson, Retirement Plan Consultant, has over 30 years of experience in the finance industry. John's main focuses include helping plan sponsors to mitigate their fiduciary responsibilities, lead fiduciary training for retirement plan committees, and serving as the lead advisor to plan sponsors for investment oversights, compliance fulfillment, best practices and plan governance.

Prior to joining the Lakeside team, John was the managing director for Sheridan Road in Indianapolis. He also served over seven years as a consultant for White Oak Advisors in Indianapolis.

#### Personal Accolades

- Strong Supporter of Indiana University Dance Marathon (IUDM) for Riley's Children's Hospital
- United Way Day of Caring Volunteer
- Rebuilding Together Duneland Volunteer

#### Education & Personal Development

- Purdue University, B.A. Communications and Advertising
- Securities Registered Series 6, 63, 65, Licensed in Life, Health, and Annuity Insurance
- Accredited Investment Fiduciary (AIF)®
- Qualified Plan Financial Consultant (QPFC)®
- Certified 401(k) Professional (C(k)P) ©

#### 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>