



LAKE SIDE

WEALTH MANAGEMENT



John Polakowski
Project Lead

Headlines:

- Murder Mystery Reader
- Professional Grandpa of Four
- US Traveler
- Fitness Walker and Outdoor Exerciser
- Avid Golfer
- Proud Grandpa of A+ Grandkids

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

John Polakowski, Project Lead, has been with Lakeside over ten years. After volunteering at the Duneland Chamber of Commerce, John joined the team to help transform Lakeside to a paperless office. Today he serves as an assistant on many office projects, runs weekly direct business and trade history reports, and maintains investment advisory agreements for advisors. John provides smiles and acknowledgement to all as he regularly finds Lakeside and Lakeside employees highlighted in local newspapers.

Prior to joining Lakeside's team, John had a very successful career at Inland Steel, working in quality control, technical service, and production. John retired from the steel industry after 36 years and with two patents under his name.

Personal Accolades

- Two US Patents for the development of high strength, low alloy, galvanized steel for the auto industry
- United Way Day of Caring Volunteer
- Rebuilding Together Duneland Volunteer
- Past President of the Duneland YMCA
- Past President of the Chesterton Lions Club

Education & Personal Development

- Michigan Tech University, B.S. Physical Metallurgy
- 50 Year Member Alumni
- Rush Chairman for Alpha Pi Omega

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. ”