



Kelley Weisenbacher
Operations Coordinator - Retirement Plan Division

Headlines:

- Theatre Star
- Disney Enthusiast
- Book Worm
- Camping Adventurist
- Lover of Crochet
- Star-Trek "Trekkie" Enthusiast

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

Kelley Weisenbacher, Senior Operations Coordinator – Retirement Plan Division, has been with Lakeside for over 12 years. She began as an Administrative Assistant and has held several positions at Lakeside before transitioning into her current role. Kelley's main focuses include coordinating all committee level plan reporting with the advisory team, ensuring follow up tasks are completed in a timely manner and coordinating work flow within the retirement plan division.

Prior to her work at Lakeside, Kelley served as an Administrative Assistant at Midwest Telecom of America and Lee Hecht Harrison.

Personal Accolades

- 1st Vice Chair for Board of Trustees at Chicago Street Theatre
- Membership Committee Chair and 14 Year Volunteer for Chicago Street Theatre
- United Way Day of Caring Volunteer
- Rebuilding Together Duneland Volunteer
- Comcast Day of Caring Volunteer
- Best Supporting Actress for Indiana Community Theater – Julius Caesar 2004 (Chicago Street Theater)
- NEITF Award Nomination for It's A Wonderful Life Sound Design 2007
- NEITF Award Nomination for A Tuna Christmas Costume Design 2010
- NEITF Award Nomination for It's A Wonderful Life: A Live Radio Play – Ensemble 2012

Education & Personal Development

- Indiana University, B.A. Theatre
- Minor in Business

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. ”