



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 collectively manage over \$1.73 Billion on behalf of institutions, corporations, and private clients.

Kelley Weisenbacher, Senior Operations Coordinator – Retirement Plan Division, has been with Lakeside for nearly 15 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. When she's not in the office, you can find Kelley serving on multiple committees, directing plays or coordinating Shakespeare in the Park for Chicago Street Theater.

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

Personal Accolades

- Chair for Board of Trustees at Chicago Street Theatre
- 17 Year Volunteer for Chicago Street Theatre
- United Way Day of Caring Volunteer
- Rebuilding Together Duneland Volunteer
- Strong Supporter of Gears for Hope – Relay for Life
- NEITF Award Nomination for Angels of Lemnos – Best Supporting Actress - 2015
- NEITF Award Nomination for It's A Wonderful Life Sound Design 2007
- NEITF Award Nomination for It's A Wonderful Life: A Live Radio Play – Ensemble 2012
- Best Supporting Actress for Indiana Community Theater – Julius Caesar 2004 (Chicago Street Theater)

Education & Personal Development

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

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. ”