LAKESIDE
WEALTH MANAGEMENT

Kelly Shikany
Director of Wealth Management Division
CFP®, CDFA ™, CWS®

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

Kelly Shikany, Financial Advisor, has over 30 years of experience in the finance industry. Kelly leads the women and wealth initiative at Lakeside. In 2013 Kelly's passion for this topic was displayed when she contributed material to Kathleen Burns Kingsbury's book "How to Give Financial Advice to Couples: Essential Skills for Balancing High New Worth Client's Needs." Kelly's main focus at Lakeside is serving her private wealth clients along with promoting and conducting Lakeside's Women Circle events.

Prior to her work at Lakeside, Kelly was a Financial Advisor at Vogelsang Asset Management. She also served as an Investment Officer at Harbour Trust & Investment Management Company.

Personal Accolades
- Influential Women of Northwest Indiana Award - 2017
- Duneland Chamber Volunteer of the Year Award - 2016
- Influential Women of Northwest Indiana Nominee - 2016
- Kelley School of Business Alumni Leadership Award – 2015
- Nine Year Michigan City Rotarian
- Northwest Indiana Alumni Student Recruiter for Indiana University
- Financial Planning Association – Home for the Homefront Member
- Former Catholic Foundation of Northwest Indiana Board Member

Headlines :
- Dave Mathews Band Fanatic
- Die-Hard Hoosier
- City Girl
- Passionate about Financial Literacy for Women

Education & Personal Development
- Indiana University, B.S. Business Analysis
- Securities Registered Series 66, 7, Licensed in Life Insurance
- CERTIFIED FINANCIAL PLANNER (CFP)®

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."