



LAKESIDE

WEALTH MANAGEMENT



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

Headlines:

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

Lakeside Wealth Management is a team of experienced professionals who collectively manage over \$1.73 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

- Indiana University Kelly School of Business Alumni Board Member
- Franciscan Alliance Foundation Board Member
- Northwest Indiana Alumni Student Recruiter for Indiana University
- 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
- Ten Year Michigan City Rotarian
- Financial Planning Association - Home for the Homefront Member

Education & Personal Development

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

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>