



LAKESIDE

WEALTH MANAGEMENT



Kelly Sieman
Senior Client Services
Associate

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

Kelly Sieman, Senior Client Services Associate, is the longest tenured staff employee at Lakeside, celebrating her ten year anniversary in 2015. She has held several positions throughout her ten years, starting as a "copy lady," before transitioning into an administrative assistant. In her current role, Kelly's primary focuses include processing all direct business, life insurance, and alternative investment accounts. She is responsible for ensuring all advisors are properly appointed for insurance licenses and securities licenses. Kelly serves on the transition team and the client engagement team inside the organization.

Prior to her work at Lakeside, Kelly spent nearly 20 years in the medical field, working mostly in an administrative assistant role in the Northwest Indiana region. She enjoys spending time with her husband and two daughters and is a dedicated cheer mom.

Headlines:

- Lakeside's Seasoned Veteran – Longest Tenured Staff Employee
- Master of Scrapbooking
- Professional Mom of Two Girls
- Book Worm of All Types
- A Toes in the Sand Type of Girl
- Shops til She Drops
- Proud IU Mom

Personal Accolades

- Chesterton Cheerleading Booster Treasurer
- Red Cross Donor
- Rebuilding Together Duneland Volunteer
- United Way Day of Caring Volunteer
- High School Cheer Mom Volunteer
- Volunteer Model for Ella's Bella

Personal Development

- Licensed in Insurance
- CPR Certified

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. ”