



LAKESIDE WEALTH MANAGEMENT



Kelly Sieman
Senior Client Services
Associate

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 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, track mom and IU mom!

Personal Accolades

- Chesterton Cheerleading Booster Treasurer
- Red Cross Donor
- Rebuilding Together Duneland Volunteer
- Strong Supporter of Riley Children's Hospital through IU Dance Marathon
- United Way Day of Caring Volunteer
- High School Cheer Mom Volunteer and Track Volunteer

Personal Development

- Licensed in Insurance
- CPR Certified

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

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

“ To educate and enable Lakeside clients to achieve financial confidence through a process aligned with their values. ”