



Kirk Futrell
Financial Advisor
CWS®

Headlines:

- Kentucky Wildcat Fanatic
C-A-T-S CATS CATS
CATS!
- Volleyball All-Star
- Bonafide Outdoorsman
- Avid Competitive Shooter
- Enthusiastic Chef

Lakeside Wealth Management is a team of experienced professionals who collectively manage over \$1.73 Billion on behalf of institutions, corporations, and private clients.

Kirk Futrell, Financial Advisor, has over 25 years of experience in the finance industry. At Lakeside Kirk's primary focuses include researching financial strategies for private wealth clients as they work towards their retirement goals. Kirk is also our Social Security leader. He educates the staff and our clients on complex filing strategies and best practices in the Social Security space. Kirk plays a pivotal role in transitioning clients into retirement and helping them adjust to life during retirement.

Prior to joining Lakeside's team, Kirk traded commodities and stock options on the trading floors at the Chicago Board of Trade and Chicago Board Options Exchange for nearly twenty years.

Personal Accolades

- Board of Directors for the Duneland Chamber of Commerce
- Chairman of the Ambassador Committee for the Duneland Chamber of Commerce
- United Way Day of Caring Volunteer
- Rebuilding Together Duneland Volunteer
- Fourteen Year Member of the North Porter County Conservation Club
- Past Chairman of the Porter County Friends of NRA 2006, 2007, 2014

Education & Personal Development

- University of Kentucky - B.S Business Administration
- Securities Registered Series 7, 65, Licensed in Insurance

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>