



LAKE SIDE

WEALTH MANAGEMENT



Kristin Lange
Client Relations
Associate

Headlines:

- Mother of Seven & “Mahna” to Two
- Book Worm of all Types
- Diamond Painting Enthusiast
- Personal Development Promoter
- Special Needs Advocate

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

Kristin Lange, Client Relations Associate, joined the Lakeside team in July of 2017. Kristin is the first point of contact for clients whether they are calling into the office or walking in for a meeting. She is responsible for coordinating conference room schedules, managing day to day office tasks and presenting our Lakeside culture to our clients. Kristin helps build a better client experience by participating on Lakeside’s Client Engagement team and has implemented a “green” initiative throughout the Lakeside office.

Prior to her work at Lakeside, Kristin spent a few years inside the special education field and then homeschooled her children for 18 years. Most recently, she was the Lead Teacher at the Social and Learning Institute and served on the Life Enrichment Team at Symphony of Chesterton. When she’s not helping to make our office run, she’s spending time with her seven children and tiny little granddaughters.

Personal Accolades

- The Social Learning Institute Board Member
- Celebrate Recovery Leadership Team Member
- Rebuilding Together Duneland Volunteer
- United Way Day of Caring Volunteer
- Strong Supporter of Embrace Grace

Education & Personal Development

- Illinois State University – B.S Special Education
- Held certifications for Learning Disabled, Behavioral Disorders and Developmentally Delayed in Education/Mentally Handicapped
- Certified in CPR

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. ”