



LAKE SIDE

WEALTH MANAGEMENT

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

Mark Chamberlain, Chief Executive Officer, started Lakeside Financial Group in 2002. As the firm grew to Lakeside Wealth Management, Mark added several key players to Lakeside's line-up, which now includes 39 team members. Mark focuses on both private wealth and retirement plan advising. He's a national advisor and also serves clients in Central America.

Prior to his work at Lakeside, Mark spent over 18 years as a Floor Broker and Trader at the Chicago Board of Trade.



Mark W. Chamberlain
Chief Executive Officer
CWS®, AWMA®, AIF®,
C(k)P®

Headlines:

- Bookworm for Life
- World Traveler
- Sports Enthusiast
- Gourmet Cook
- Professional Father & Grandfather
- Gifted Musician
- Talented Writer

Personal Accolades

- Indiana State Chamber Board Member
- Board of Directors for Frontline Foundation
- Strosaker Early Learning Fellow and Founding Member
- IU Health ASC Board Member
- Advisory Board for the Financial Services Institute
- Duneland Economic Development Committee Board Member
- Finalist for the Small Business Person of the Year Award - 2011
- Top Northwest Indiana CEO's List named by Indiana Business Quarterly - 2010

Education & Personal Development

- Wabash College
- Securities Registered Series 7, 24, 51, 63, 66, Licensed in Health Insurance
- Certified Wealth Strategist (CWS) ©
- Accredited Wealth Management Advisor (AWMA) ©
- Accredited Investment Fiduciary (AIF) ©
- Certified 401(k) Professional (C(k)P) ©

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. ”

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>