



LAKE SIDE

WEALTH MANAGEMENT

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



Megan Marshall
Financial Advisor

Megan Marshall, Financial Advisor began her career at Lakeside shortly after graduating from Purdue University. Her focus primarily resides in the private wealth division, serving as a team advisor under CEO, Mark Chamberlain. Megan's responsibilities include client meeting preparation and follow up, market research, data analysis and assisting the retirement plan division with participant enrollment meetings. She has become a leading advisor for next generation clients, helping young adults start their financial journeys. Megan also works closely with advisor Kelly Shikany to promote and execute Lakeside Women's Circle events.

Prior to joining the team Megan was an intern with Lakeside, working in both the private wealth division and the retirement plan division. She also served as an Administrative Assistant for 1st American Management Company and Beachwalk Property Owners Association.

Personal Accolades

- Porter County Community Foundation Board Member
- Family House - Board Chair
- Heritage Lutheran Church - Board Treasurer
- Rebuilding Together Duneland Volunteer
- United Way Day of Caring Volunteer
- Duneland Diamond Volunteer
- Former member of the Purdue Volunteer Network

Education & Personal Development

- Purdue University, B.S. Financial Counseling and Planning with a minor in Management
- Securities Registered Series 7, 63, 65

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:

- Classic Cat Lover
- Running Enthusiast
- Naturalist and Outdoor Explorer
- Office Fashionista
- Avid Scrapbooker
- Office Puppy Sitter

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>