LAKESIDE
WEALTH MANAGEMENT

Megan Marshall
Financial Advisor

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

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 support 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 severed as an Administrative Assistant for 1st American Management Company and Beachwalk Property Owners Association.

Headlines :

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

Personal Accolades

- Board Treasurer at Heritage Lutheran Church
- Board Chair – Family House
- 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

- 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 . ”