



LAKE SIDE

WEALTH MANAGEMENT



Michael DeLeon
Retirement Plan
Consultant
AIF©, CWS©, C(k)P©

Headlines:

- Devoted Family Man
- Youth Soccer Coach Extraordinaire
- Soccer Enthusiast
- Master Poker Player
- Avid Music Lover (of anything except country)
- Craft Beer Connoisseur

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

Michael DeLeon, Retirement Plan Consultant, began his career at Lakeside as an intern from Indiana University Northwest. Shortly after passing his licensing and certification exams, Michael transitioned into a Financial Advisor, focusing primarily on corporate retirement plan advising. Today, Michael's primary focus remains on the corporate retirement plan division, helping plan sponsors navigate through and satisfy Department of Labor and ERISA fiduciary responsibilities, assisting plan sponsors execute best practices, working with plan sponsors to optimize plan design, educating participants on financial wellness and helping participants get retirement ready.

Prior to joining the Lakeside team, Michael spent over ten years in the Entertainment and Gaming industry, serving as a Poker Room Supervisor both in Northwest Indiana and Las Vegas, Nevada.

Personal Accolades

- Ballet Folklorico Tapatio Dance Company Volunteer
- United Way Day of Caring Volunteer
- US National "E" Licensed Soccer Coach
- Strong Supporter of the Boys & Girls Clubs of Porter County

Education & Personal Development

- Indiana University Northwest, B.S. Business, Finance Focus
- Securities Registered Series 7, 63, 65, Licensed in Insurance
- Accredited Investment Fiduciary (AIF) ©
- Certified Wealth Strategist (CWS) ©
- Certified 401(k) Professional (C(k)P) ©

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>