



LAKESIDE

WEALTH MANAGEMENT



Michele Heinold
Director of Operations

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

Michele Heinold, Director of Operations, has been with company for over 9 years. She is a driving force behind Lakeside's corporate 401(k) division. Michele is responsible for leading an eight-person team who collectively service clients, onboard new plans, and assist advisors where needed. She also provides ongoing evaluation of current practices within the division and helps to develop new and improved business practices.

Prior to her work at Lakeside, Michele spent 4 years as an Occupational Health and Wellness Director. Previous to that, Michele embraced her passion for animals, serving as a Licensed Veterinary Technician for over 15 years.

Personal Accolades

- Strong Supporter of the ASPCA
- United Way Day of Caring Volunteer
- Rebuilding Together Duneland Volunteer
- Strong Supporter of the Domestic Violence Recovery Center
- Chicago Marathon Volunteer

Education & Personal Development

- Columbia State Collage, Veterinary Technology, AS
- Middle Tennessee State University, B.S Health & Wellness
- CPR Certified

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:

- Workout Fanatic
- Office Germaphobe
- Animal Lover
- Obsessor of Lip Gloss
- Toes in the Sand Type of Girl
- Fur-Mommy to Two

“ To educate and enable Lakeside clients to achieve financial confidence through a process aligned with their values. ”