LAKESIDE
WEALTH MANAGEMENT

Nick Walding
Director of Portfolio Management
CFA®

Headlines :

- Lover of the Outdoors
- Avid Hiker
- State and National Park Explorer
- History and Biography Bookworm
- Passionate about his work in his church
- Devoted Husband and Daddy

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

Nick Walding, Director of Portfolio Management, started at Lakeside as an intern while attending Valparaiso University. After earning his Chartered Financial Analysis® (CFA) designation, Nick transitioned into his current role. His main focus is to develop and implement investment strategies to address client investment objectives and constraints. Nick is also responsible for measuring and evaluating portfolio performance, monitoring investment market conditions and rebalancing investment portfolios as necessary.

Prior to his work at Lakeside, Nick served as a Representative for Ferrellgas Partners.

Personal Accolades

- Vice President of the Chesterton Redevelopment Commission
- Member of the Chesterton Economic Development Commission
- Valparaiso University Financial Management Association Advisory Board Member
- Past President and Member of the Chesterton Town Council 2010-2015
- Volunteer at Fairhaven Church
- Rebuilding Together Duneland Volunteer
- United Way Day of Caring Volunteer

Education & Personal Development

- Valparaiso University, BS in Business Administration, Finance
- Securities Registered Series 7 and 66
- Chartered Financial Analyst® (CFA)
- CPR Certified

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 . ”