



## 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 collectively manage over \$1.73 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

- Member of the Chesterton Redevelopment Commission
- Member of the Chesterton Economic Development Commission
- Volunteer at Fairhaven Church
- Rebuilding Together Duneland Volunteer
- United Way Day of Caring Volunteer
- Past President and Member of the Chesterton Town Council 2010-2015

#### Education & Personal Development

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

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