LAKESIDE
WEALTH MANAGEMENT

# Nicole Pollock
Senior Client Services Associate

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

Nicole Pollock, Senior Client Services Associate, has over 10 years of experience in the finance industry. In early 2017 Nicole entered into her most recent role as Senior Client Services Associate, servicing Lakeside clients by assisting in asset movement, opening and maintaining accounts, and managing daily operational tasks. Nicole serves on both the transition team and the client engagement team inside the organization.

Prior to her work at Lakeside, Nicole spent five years with Fifth Third Bank. She began as a Lead Customer Service Representative and quickly transitioned to a Customer Service Manager. Nicole also served as a Marketing and Promotions Intern for CBS Radio while attending Ball State University.

## Personal Accolades

- Rebuilding Together Duneland Volunteer
- United Way Day of Caring Volunteer
- American Red Cross Advocate
- Lakeshore Paws Volunteer including Dog Walking, Fostering Homeless Dogs and Assisting at Fundraising Events
- 11 Year Volunteer with the Angel Tree Organization

## Headlines :

- Devoted Concert Goer
- Passionate about Dog and Cat Rescues
- Sports Enthusiast
- Addicted to Cheesecake
- Avid wearer of heels
- Often found “twinning” with her adorable daughter

## Education & Personal Development

- Ball State University, B.A. Marketing
- Member of Pi Beta Phi

## 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 . ”