LAKESIDE
WEALTH MANAGEMENT

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

Shirley Long, Participant Services Associate – Retirement Plan Division, has been with Lakeside for over 10 years. Working on the corporate 401(k) side of LWMG, Shirley is the liaison for plan participants, answering and facilitating all participant questions and concerns. Shirley also contributes to 401(k) presentations to plan sponsors and participants. When she isn't on the phone or managing her emails, Shirley is often found taking care of staff and clients, fulfilling her unofficial role as Lakeside Mom.

Prior to joining the Lakeside team, Shirley spent nearly 25 years as an office manager in the medical field.

Shirley Long
Participant Services Associate Retirement Plan Division

Headlines :

- Bookworm
- Professional Mom of Three Successful Kids
- Lakeside Momma
- Cooking Enthusiast
- Sewing and Quilting Master
- Professional Grandma to a vibrant little grandbaby

Personal Accolades

- Rebuilding Together Duneland Volunteer
- United Way Day of Caring Volunteer
- Comcast Day of Caring Volunteer
- Strong Supporter of Housing Opportunities
- Sewing for Africa Volunteer
- Strong Supporter of Habitat for Humanity

Education & Personal Development

- LaPorte Business College, B.S Business Administration
- Securities Registered Series 6
- 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."