LAKESIDE
WEALTH MANAGEMENT

Timothy D. Rice
President
AIF©, CWS©, C(k)P©

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

Tim Rice, President, has over 15 years of experience in the finance industry. He began his career at Lakeside Wealth Management in 2004. Tim focuses in both private wealth and retirement plan advising.

Prior to his work at Lakeside, Tim was a Derivatives Specialist for Goldman Sachs. He also served in key business development roles at The Minute Maid Company and Hormel Foods Corporation.

Personal Accolades

- Nominated for the Invest in Others - Community Service Award - 2018
- Board Treasurer of the Boys and Girls Club of Greater NWI
- Past Board Chair of the Boys and Girls Club of Porter County
- Co-Chair of $4.5 million Capital Campaign for Boys & Girls Clubs of PC
- Founding Lecturer of The Retirement Advisor University and The Plan Sponsor University at UCLA
- Porter County Community Foundation Advisor of the Year - 2012
- Past Board Chair Housing Opportunities and Volunteer of the Year - 2011
- 300 Most Influential Advisors - 2010 & 2011

Education & Personal Development

- Indiana University, B.S. Public Finance
- Securities Registered Series 7, 63, 65, Licensed in Insurance
- Accredited Investment Fiduciary (AIF) ©
- Certified Wealth Strategist (CWS) ©
- Certified 401(k) Professional (C(k)P) ©

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

Headlines :

- Hoosier Fanatic
- Avid Golfer
- Skiing Enthusiast
- World Traveler
- Painter
- Passionate about leaving the world a better place than he found it

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