LAKESIDE
WEALTH MANAGEMENT

Lakeside Wealth Management is a team of experienced professionals who collectively manage over $1.73 Billion on behalf of institutions, corporations, and private clients.

Tim Rice, President, has nearly 20 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.

Timothy D. Rice

President
AIF©, CWS©, C(k)P©

Headlines :

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

Personal Accolades

- Financial Times Top 401(k) Advisors List - 2019
- Finalist for the Invest in Others - Community Service Award - 2018
- Board Member of the Boys and Girls Club of Greater NWI
- Founding Lecturer of The Retirement Advisor University and The Plan Sponsor University at UCLA
- Co-Chair of $4.5 million Capital Campaign for Boys & Girls Clubs of PC
- Porter County Community Foundation Advisor of the Year - 2012
- Past Board Chair Housing Opportunities and Volunteer of the Year - 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

- 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 . ”