



LAKESIDE WEALTH MANAGEMENT



**Timothy J.
VerSchure**
Senior Vice President
AIF©, CWS©, C(k)P©

Headlines:

- Avid Water Skier
- Do-it-Yourself- Home Improvement Master (or Disaster)
- Youth Sports Taxi Driver
- Professional Dad to Three Kids
- Snow Skiing Enthusiast

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 VerSchure joined the Lakeside Wealth Management team in 2008 as a Financial Advisor. Today, Tim serves as Senior Vice President of Lakeside. As head of the Retirement Plan Division, Tim oversees 180+ corporate and institutional accounts. For his private wealth clients, Tim focuses on designing and implementing financial planning strategies that align with their retirement goals.

Tim came to Lakeside with a background in the financial services industry, working previously for FinanSure, a home loan and student loan company.

Personal Accolades

- President - Valparaiso Parks Foundation - 2020
- Financial Times Top 401(k) Advisors - 2015-2019
- NAPA Top 50 Advisors Under 40 - 2014, 2015, 2016
- Northwest Indiana Times 20 Under 40 List - 2014
- The Plan Sponsor University Adjunct Lecturer

Education & Personal Development

- Purdue University, B.S. Business Management
- Securities Registered Series 7, 66 and Licensed in Life and Health 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. ”

Investment Advisor Representative offering services through Lakeside Wealth Management Group, LLC Registered Representative offering securities through First Allied Securities, Inc. A Registered Broker/Dealer Member FINRA/SIPC Lakeside Wealth Management Group, LLC and First Allied Securities, Inc. are not affiliated companies. Check the background of this investment professional on FINRA's BrokerCheck website: <http://brokercheck.finra.org>