



Tom Muldowney
Financial Advisor

Headlines:

- Golf and Basketball Enthusiast
- Family Man
- History Buff
- Dedicated Loyola University Chicago Alumni

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

Tom Muldowney, Financial Advisor, joined the Lakeside team with over twenty five years of experience in financial services. Tom serves both private wealth clients and corporate 401(k) clients at Lakeside. His focuses include conducting client meetings and follow ups, researching financial strategies for clients and helping guide clients through retirement planning. When asked what he loves most about being a financial advisor, Tom will tell you he thrives on the unique opportunities to help make positive differences in the lives of his clients.

Prior to joining the Lakeside team, Tom spent fifteen years with Northern Trust. He most recently spent over eight years with Wells Fargo.

Personal Accolades

- Board Member of the Boys and Girls Club of Michigan City
- Ronald McDonald House Advocate
- Rebuilding Together Duneland Volunteer
- United Way Day of Caring Volunteer
- Past Board Member of the San Miguel School

Education & Personal Development

- Loyola University – B.S. Finance
- Securities Registered Series 7, 63, 66. Licensed in Insurance

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. ”

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>