LAKESIDE
WEALTH MANAGEMENT

Tom Muldowney
Financial Advisor
C(k)P®

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

Tom Muldowney, Financial Advisor, joined the Lakeside team with over 25 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

Headlines :

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

Education & Personal Development

- Loyola University – B.S. Finance
- Certified 401(k) Professional (C(k)P) ©
- Securities Registered Series 7, 63, 66. Licensed in Insurance

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. ”