LAKESIDE
WEALTH MANAGEMENT

Chris Ylo
Financial Advisor
AIF©, C(k)P®

Headlines

- Avid Sports Fan – Golf, Tennis and Basketball
- Man of March Madness
- Adventurist – Loves a Great Long Weekend Get-a-way
- Microbrew Master
- Proud Dad of Three Outstanding Young Adults

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

Chis Ylo, Financial Advisor, joined the Lakeside team with over 25 years of exceptional service in the financial industry. As a seasoned professional, Chris has focuses in both individual wealth management and corporate 401(k) planning. He enjoys helping his clients navigate their financial journey to retirement and successfully transitioning into life after retirement. For Chris, there's nothing better than getting invited to a client's retirement party!

Prior joining the Lakeside team, Chris served as a Senior Financial Advisor at Strategic Financial Group and Vice President at Wintrust Wealth Management. When he's not in the office, Chris can be found cheering on his favorite sports teams and sending time with him wife and three kids.

Personal Accolades

- Munster Lions Club – Club Secretary and former President
- Volunteer Coach for Youth Basketball and Youth Soccer
- Volunteer at St. Thomas More Annual Parish Festival
- Town of Muster – Nominating Committee
- Muster Lion of the Year Award Recipient -
- Avid Supporter of the Northwest Regional SWAT Team

Education & Personal Development

- University of Illinois- Champaign. Major - Accountancy
- Securities Registered Series 7, 63, 65, Licensed in Insurance
- Accredited Investment Fiduciary (AIF) ©
- 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