



LAKE SIDE

WEALTH MANAGEMENT



Elizabeth Tavidian
Executive Assistant

Headlines:

- Lover of All Things Antique
- Avid Collector of Collectables
- Classic Car Enthusiast
- Extreme Sport Fan
- Loves a Great Adventure
- Catch Her on a Trail or Horseback Riding with Her Daughter

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

Elizabeth Tavidian holds a dual role with Lakeside, serving as the Executive Assistant for Vice President, Jennifer San Fillippo, and Office Manager our "Lakeside North" campus in Brookfield Wisconsin. Her primary focuses outside of maintaining schedules include assisting with client meeting preparations, preparing expense reports, and tracking client follow up requirements. Elizabeth also manages day to day operations for the office including answering phones, responding to fax requests and coordinating office visits.

Prior to joining the Lakeside team, Elizabeth served as the executive assistant and event coordinator for AXA Advisors. She also served as an office manager for Allstate. In her spare time, you can find Elizabeth participating in extreme sports such as bobsledding or sky diving!

Personal Accolades

- Volunteer for The Ridge Community Church 2013-Present
- Strong Supporter of Hope Without Borders
- 10+ Year Volunteer for Operation Christmas Child
- StreetLife Communities Volunteer

Education & Personal Development

- Paul Smith College – BS Hospitality Management
- 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. ”