LAKESIDE ADVISORS, INC.
Registered Investment Advisory

(206) 285-1730

How We Work

Our first priority is helping you take care of yourself and your family. We want to learn more about your personal situation, identify your dreams and goals, and understand your tolerance for risk. Long-term relationships that encourage open and honest communication have been the cornerstone of our foundation of success.

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Investment Philosophy

We manage each client’s investment portfolio based on your specific needs.

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Personal Planning

Years of experience have prepared us to guide you through your life transitions.

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Products & Services

We create strategies that are tailored to your needs and goals.

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Welcome to Lakeside Advisors, Inc.!

Lakeside Advisors, Inc., an investment adviser registered with the Securities and Exchange Commission, and incorporated on January 30, 1984. It was established by Robert E. Frey, CFP to assist individuals with every aspect of financial planning. While the client base expanded to include pension and profit sharing plans, trusts, and corporations, the firm primarily counsels individuals. Counseling entails retirement plans, college savings, insurance coverage, tax and estate planning. Lakeside Advisors also manages full discretion accounts and provides advice for limited discretion accounts. Lakeside Advisors' structure is to provide quality investment advice and help in implementing that advice.

'Poplars on the Canal' T. Gibbs '99

Client Centered

At **Lakeside Advisors, Inc.**, investing is both an art and a science. Our office proudly displays innovative works of art to balance the technological aspects of our business.

Have a Question?

Name

Email

Phone

Question

SEND

Contact

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