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Lakeside Financial Consultants, Inc.

 (800) 717-2008

Welcome

Our process at Lakeside Financial Consultants, Inc. starts and ends with you. As we learn about your needs and goals; we'll chart a course toward your financial destination. Since we're talking about you're legacy, we'll consider all factors that are important to you and your loved ones. As time goes by, we'll adjust the plan to make sure you stay on track.

By performing a quick "planning check-up", we may discover ways you can avoid some taxes, decrease others, and free up more of your investment gains for you and your family.

Integrity, exceptional services, cutting-edge financial tools ... that is what the team at Lakeside Financial Consultants, Inc. can bring to the process. It's not just your financial goals -- it's your life. Your future, your family, your retirement, your dreams!

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Our Process

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

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Our History

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

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Our Values

Trust. Honesty. Integrity. We believe values matter, and we live by ours every day.

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Understanding Today's Financial Environment

We can help take the mystery out of preparing for today and tomorrow. Whether you are investing to build wealth, protect your family, or preserve your assets, our personalized service focuses your needs, wants, and long-term goals.

Our team of professionals have years of experience in financial services. We can help you address your needs of today and for many years to come. We look forward to working with you.

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Your Financial Future

Today's economic environment presents many challenges. But along with these challenges comes opportunities and potential rewards for those who can identify long-term trends.

Whether you're facing retirement—or looking to better understand certain investment ideas—we can help you address your most pressing financial questions.

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"Remember, what does 'retirement' mean? It doesn't mean that you're a couch potato. Leisure is not the same things as rest. If you're bicycling five miles a day, that's leisure, but it certainly takes a lot of effort."

Robert Fogel

Have a Question?

Name

Email

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