



Enriching Lives

COMMUNITY ENGAGEMENT REPORT

2023



The Goelzer EXPERIENCE

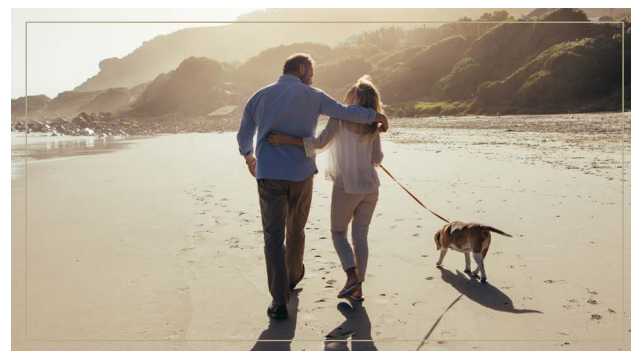
INSTITUTIONAL ADVISORY SERVICES for endowments, foundations, non-profits, and governmental entities



Goelzer's Institutional Advisory Services team provides specialized outsourced chief investment officer services.

- A premier suite of consulting services beyond a traditional consultant relationship.
- Customized, high-caliber solutions to position our clients for success.

GOELZER PRIVATE OFFICE for ultra-high net worth individuals and families



Goelzer's Private Office advisors provide a comprehensive approach to generational wealth.

- **Holistic Wealth Planning:** Customized solutions tailored for families with generational wealth, business owners, executives facing concentrated wealth challenges, and those with complex estates.
- Cohesive institutional-quality investment strategies, blending public and private asset management, including closely held assets, unified by consolidated reporting.

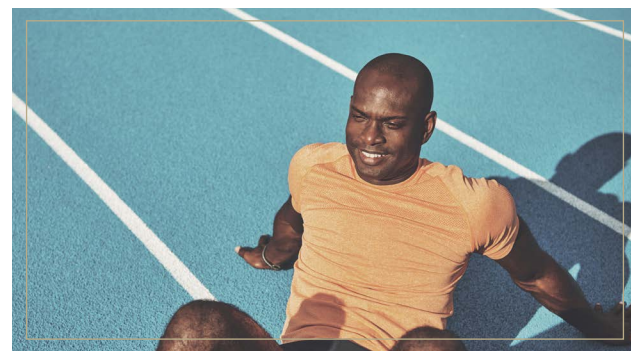
WEALTH ADVISORY for successful high net worth individuals and families



Goelzer's Private Client team provides comprehensive wealth planning and investment management services.

- **Wealth planning:** including cash flow planning, education planning, charitable giving strategies, and retirement needs and readiness analysis.
- Investment management solutions focused on portfolio risk, asset allocation, and dynamic portfolio solutions across various asset classes.

G•PRO for professional athletes, their families, and their coaches



Goelzer's G•PRO advisors provide comprehensive wealth advisory services.

- NFLPA Registered Player Financial Advisor.
- Specialized services including financial education, managing cash flow, career and post-career planning, and tax planning.

◀ With over 50 years of experience and more than \$3 billion in assets under advisement, Goelzer Investment Management is an investment advisory firm that leverages our proprietary investment and financial planning strategies to help successful families and institutions Dream, Invest, and Live.

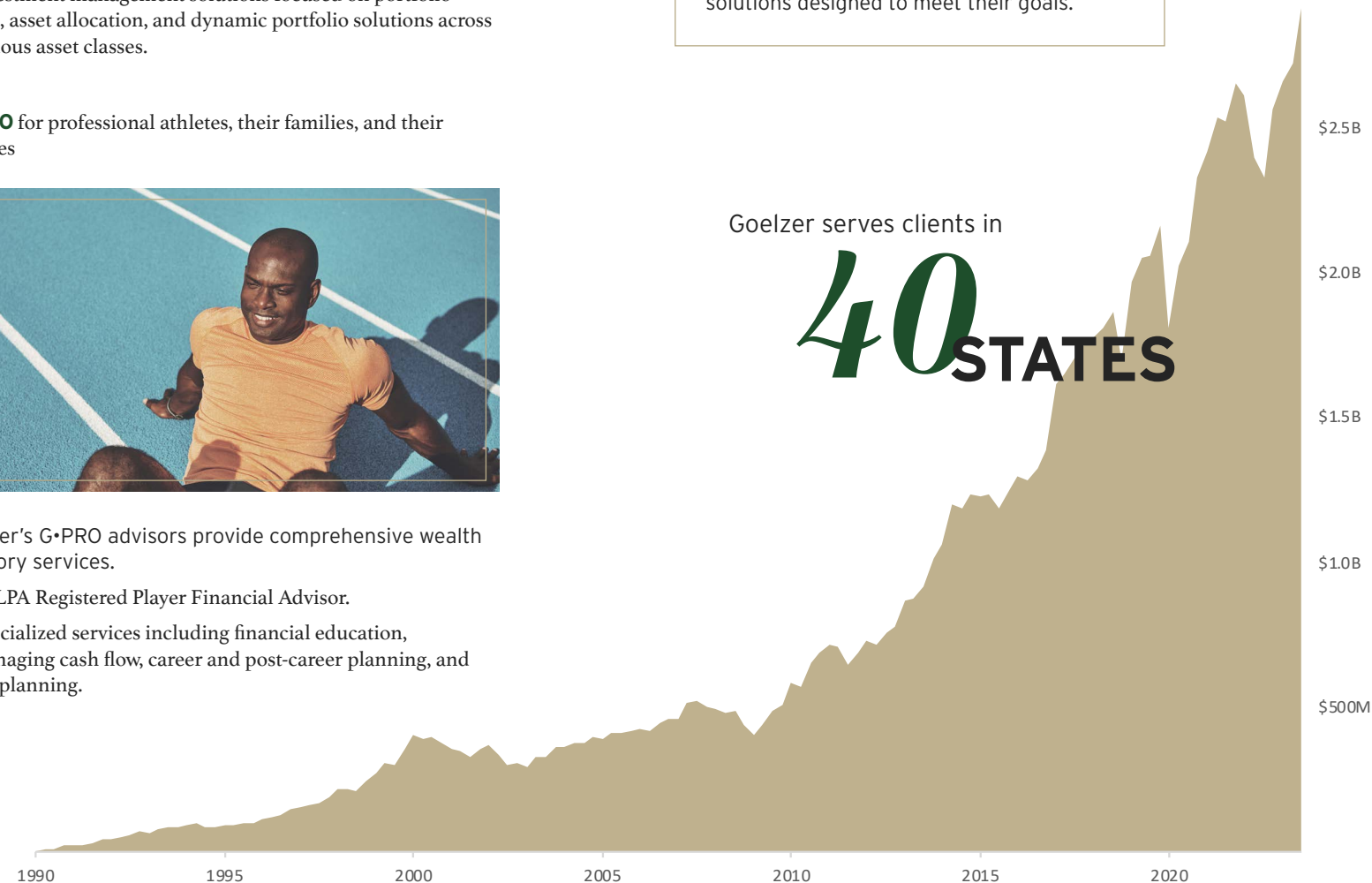
INVESTMENT MANAGEMENT underpinning our services to all of our clients

Goelzer's Investment Management team manufactures our proprietary research and investment strategies.

This proven approach gives us better insight into the markets and enhances our ability to provide advice on a wide array of investment options, including external investment options, so institutional and private clients have comprehensive solutions designed to meet their goals.

Goelzer serves clients in

40 STATES



Assets Under Management as of September 30, 2023

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A Message from **OUR CEO**



This has been an exciting year of growth at Goelzer, and I am eager to report on our efforts to enrich the lives of our clients, colleagues, and community.

We now manage more than \$3 billion in assets under advisement for more than 600 clients in 40 states. We have enjoyed continued expansion of our wealth advisory services we provide to our private clients and the institutional advisory services we provide to endowments, foundations, associations, and other non-profits—many of which are recognized on pages 10 and 11.

This year, we have further enhanced our services for ultra-high net worth individuals and families with complex estates, which we now call Goelzer Private Office. We continue to expand our reach across Indiana in our service to the Indiana Sheriffs' Association and county sheriff's offices. And our G•PRO wealth advisory service for pro athletes now serves more players in the NFL.

We are humbled by the support of our clients and broader community. As we grow and evolve, so does our capacity to give back.

In 2023, we have engaged in new ways with the Independent Colleges of Indiana, the Association of Business Administrators of Christian Colleges, and the Indiana Chamber of Commerce. And we have continued to support the Collaborative Women in Investment Management, Indiana Philanthropy Alliance, WFYI, and many other organizations.

In this year's report, we feature 19 of our team members and their engagement efforts. Each profile offers a glimpse into the impact our team members are making and the fulfillment they find in their volunteer work during 2023.

In November, we convened a very special event with Marianne Glick and Yvonne Shaheen—two of our community's leading philanthropists—where they shared their thoughts on community engagement with non-profit leaders and board members and business and community leaders. And we continued to share our thoughts on the markets, the economy, financial planning strategies, and more through our *Insights* pieces and in the national press.

None of this would be possible without our amazing team members. Because of their hard work, we have earned the recognition as a Best Place to Work in Indiana again this year and as a Best Place to Work in Money Management from *Pensions & Investments* in a nationwide review. And we have achieved 100% participation in our United Way campaign for the tenth year in a row!

I hope you enjoy this report as much as I do. Please do not hesitate to reach out to me or any member of our team if you would like to explore how we might make a difference together.

GREGORY W. GOELZER
Chief Executive Officer

Our Core **PURPOSE**

Enriching the lives of our clients,
colleagues, and community.

Our Core **VALUES**

Choosing the Difficult Right Over the Easy Wrong

Focusing on What Matters to You

Striving for Positive Outcomes & an Awesome Client Experience

Providing a Thoughtful Approach in All We Do

Celebrating Individual Growth & Team Success

AMERICAN PIANISTS ASSOCIATION

"My volunteer work with the American Pianists Association has allowed me to combine my passion for music with my desire to make a positive impact on the arts and promote and advance the careers of young American, world-class jazz and classical pianists."



Greg and Suzy Goelzer are pictured here at a reception they hosted for the APA earlier this year. Emmet Cohen, second to right, is the winner of the 2019 American Pianists Award and a recipient of the Cole Porter Fellowship in Jazz.

For more engagement profiles, please see pages 6, 7, and 8.

BEST PLACES TO WORK IN INDIANA

In 2023, Goelzer was selected again as a Best Place to Work in Indiana by the Indiana Chamber of Commerce. This is the eighth time in nine years that the firm has been selected for this prestigious recognition!



For more information, please visit goelzerinc.com/insights_post/best-place-to-work-in-indiana-2023/.

BEST PLACES TO WORK IN MONEY MANAGEMENT

Goelzer was also named a 2023 Best Place to Work in Money Management by *Pensions & Investments* in a nationwide review!

For more information, please visit goelzerinc.com/insights_post/best-place-to-work-in-money-management-2023/.

EMPLOYEE-OWNED COMPANY

As an employee-owned company, every member of Team Goelzer is personally invested in helping our clients achieve their goals.

Our Employee Stock Ownership Plan (ESOP) is a critical part of a broader commitment to employee ownership that we have at Goelzer. It is 100% company-funded, and it affords our team members an important retirement benefit.

In 2022, we became certified by Certified EO, which has rigorous standards for significant and broad-based employee ownership.

For more information, please visit certifiedeo.com.



Enriching Lives IN OUR COMMUNITY

At Goelzer, we encourage our team to get meaningfully involved in non-profits. We provide paid time off to volunteer because we believe we have a corporate social responsibility to engage.

COOKIES FOR KIDS' CANCER

"Motivated by the heartbreaking battle of a friend's son with Neuroblastoma, I became a founding board member of Cookies for Kids' Cancer, a pediatric cancer research non-profit.



Donald J. Hutchinson
Managing Director,
Institutional Advisory Services
Board Member Since 2008
Current Board Treasurer

Witnessing the funding gap for childhood cancer, we focus on promising research. Proudly, we've funded therapies saving local children's lives. One recipient attends school with my son."



LADIES UNDER CONSTRUCTION

"The youth of today are crying out for help. As a woman of color, programs like this didn't exist when I was growing up. I see young girls in our schools, at church, and in public, and I see their needs.



Michelle J. Maye
Controller
Volunteer Since 2021

I want to see young girls succeed, and I believed I could help them see for themselves that your destiny is not defined by your circumstances."



THE NATURE CONSERVANCY

"The Nature Conservancy's mission of protecting the lands and waters on which all life depends is near and dear to my heart. I grew up spending a great deal of time in nature and around agriculture, and I love being outdoors.



Suzy S. Goelzer
Director of Strategic
Partnerships
Board Member Since 2019

I want to ensure that our children and their children have the same opportunity. So I have dedicated myself to supporting TNC and encouraging others to get engaged with TNC."



PROVIDENCE CRISTO REY HIGH SCHOOL CORPORATE WORK STUDY

"I am passionate about the Corporate Work Study program because I relate to the origin story of many of the students. I didn't grow up much differently than many of the students who get the privilege to attend PCRHS.



Lamica A. Simmons
HR Director
Volunteer Since 2021

While I consider myself successful, I can't imagine the things these students will accomplish! The Corporate Work Study program takes otherwise disadvantaged youth and prepares them to be the leaders of tomorrow."



COLLEGE MENTORS FOR KIDS

"College Mentors for Kids transforms lives by connecting elementary school-aged kids to college students through weekly on-campus activities.



Brian J. Pyne
Managing Director, Private Client
Board Member Since 2013

The children feel more confident about themselves, and they start thinking about future careers and higher education while still in elementary school. On top of that, our college student mentors are developing a sense of leadership, purpose, and love for engaging in their community."



DOVE RECOVERY HOUSE FOR WOMEN

"Dove House helps those affected by the opioid crisis by fostering collective responsibility, reducing stigma, and offering holistic support for women in recovery. It champions a comprehensive approach to Substance Use Disorder, including post-recovery support.



Janet S. Sweet
Sr. Institutional Consultant
Board Member Since 2017
Current Board Treasurer

In my service on the board, we have worked hard over many years to transform Dove House from a resource-limited non-profit to a well-established organization."



INDIANA LANDMARKS

"As the nation's largest historic preservation organization, Indiana Landmarks is uniquely equipped to have a both broad and deep impact in preserving history and place.



Brett D. McKamey
President
Board Member Since 2013
Current Board Treasurer &
Chair of Finance Committee

I especially enjoy what our organization does to reimagine, rescue, and revive meaningful places in Indiana so that their uniqueness is preserved, enhanced, and enjoyed for generations to come."



HOLY CROSS LUTHERAN CHURCH FOUNDATION

"As a Christian, I strongly believe that we are placed here on earth to do the work that God has set before us. I also believe that the church is a place where Christians come together in community to serve God.



Jeffrey A. Bush
General Counsel & Chief
Compliance Officer
Board Member Since 2017

I am a member of Holy Cross Lutheran Church and strongly support the mission of the church. I became involved in the church's Foundation to help steward and direct funds to further that mission."



COLLABORATIVE WOMEN IN INVESTMENT MANAGEMENT

"One of the cornerstones of investing is diversification to mitigate risk, yet diversity representation within the financial industry is sorely lacking. This discourages young women from entering the field, which limits the talent pool and perpetuates the problem.



Helena Ocampo
Senior Portfolio Manager
Volunteer Since 2020

Collaborative Women in Investment Management works to counter this vicious cycle, and I am proud to lead Goelzer's involvement with CWIM."



LITTLE RED DOOR CANCER AGENCY

"Many of my family members have been touched by cancer, and the support of our family helps alleviate some of the anxiety of the unknown. The thought that someone would have to deal with a cancer diagnosis without having a support group really hit me. Little Red Door provides that support!



Heather A. Tilton
Senior Manager,
Portfolio Operations & IT
Volunteer Since 2021

In addition to fundraising efforts, I volunteer at various LRD events including the Cancer Survivors Day each summer."



IU SCHOOL OF MEDICINE PLANNED GIVING COMMITTEE

"I am amazed by the medical research that takes place at the IU School of Medicine, and I am happy to introduce potential donors so the school can continue its important work.



J. Andrew Concannon
Chief Investment Officer
Board Member Since 2003

My volunteer work helped facilitate a significant research grant from a couple affected by Lou Gehrig's disease and connected IU doctors to a healthcare organization in Ireland."



RILEY CHEER GUILD

"The Riley Cheer Guild provides comfort to patients and caregivers at Riley Hospital for Children and the IU Health adult hospitals in downtown Indianapolis. The Guild provides donated toys to hospitalized children and also offers music therapy services.



Dean P. Weseli
Senior Wealth Advisor
Director of G-PRO Sports
Board Member Since 2014

As a board member and former president, I'm proud to have contributed to transforming our primary fundraiser into the successful Music Therapy Rocks Concert—now in its sixth year."



GIRLS INC. OF GREATER INDIANAPOLIS

"Girls Inc. of Greater Indianapolis inspires girls to be strong, smart, and bold by delivering programs that encourage participants to be proud of who they are and be better prepared for the future."



Chris W. Cotterill
Chief Operating Officer
Board Member Since 2023
Chair of Strategic Planning Task Force



This has been an incredible year of change at Girls Inc! The team has greatly enhanced our programming, renovated its space, instituted higher expectations for its board members, and more. We have great momentum going into 2024."

INDIANAPOLIS BAROQUE ORCHESTRA

"The Indianapolis Baroque Orchestra performs and promotes music of the 17th and 18th centuries using period instruments and historically informed performance practices."



David S. Alexander
Senior Wealth Advisor
Volunteer Since 2023



As a performing musician and former music teacher, I believe strongly in the value of maintaining awareness of baroque music in the eyes of the public through concert performances, recordings, and education to broaden appreciation of music and to draw future performers into the genre."

HERRON CLASSICAL SCHOOLS

"Herron Classical School champions a classical, liberal arts education that shapes students for leadership and service. I was drawn to Herron because of its culture of excellence, impressive academic results, diverse scholar community, and commitment to free tuition."



Adrian O. Miller
Senior Wealth Advisor
Board Member Since 2014



Our engaged board has helped Herron grow from a single high school to become a network of three charter schools under the umbrella of Herron Classical Schools."

CFA SOCIETY INDIANAPOLIS: CFA RESEARCH CHALLENGE

"I first got involved in the CFA Society Indianapolis as a timekeeper for the CFA Research Challenge. My passion for the CFA Research Challenge stems from its role in bridging the gap between academia and real-world application for college students."



Craig A. Maschmeyer
Associate Portfolio Manager
Volunteer Since 2019



We've empowered students to apply their knowledge to real companies, offering valuable experiences as they embark on their careers."

THE STEM CONNECTION

"I'm proud to be involved with The STEM Connection, a non-profit fostering hands-on STEM experiences. By subsidizing costs for those with limited resources, we help bridge gaps to help ensure that all kids have access to enriching STEM opportunities."



Umesh S. Nathani
Portfolio Manager
Volunteer Since 2023



My first interaction was in May 2023 during a visit to their farm. Since then, I have volunteered for STC's STEM Family Kits program designed to distribute engaging materials and supplies to kids."

ST. FRANCIS SOCCER CLUB

"My son has played at the soccer club on recreational or travel teams since he was 3."



Aimee M. Deveau
Office Manager & IT Specialist
Volunteer Since 2021



As a team manager since 2021, I have helped by volunteering at club tournaments, managing team scheduling, and organizing tournament registrations and travel plans."

I also served as a member of the fundraising board this spring, which helped raise funds for a future shelter and indoor plumbing on the property."

Organizations WE SUPPORT

BOARD SERVICE ▶

In 2023, Goelzer team members volunteered on the boards of the following 25 organizations.

- American Pianists Association
- CFA Society of Indianapolis
- College Mentors for Kids
- Cookies for Kids' Cancer
- Dove Recovery House for Women
- Girls Inc. of Greater Indianapolis
- Herron Classical Schools
- Holy Cross Lutheran Church Foundation
- Huntington University President's Advisory Council on Excellence
- Indiana Chamber of Commerce
- Indiana Landmarks Foundation
- Indianapolis Baroque Orchestra
- Indy Women's Pro Volleyball
- IU Kelly School of Business Dean's Council
- IU School of Medicine Planned Giving Committee
- Ladies Under Construction
- Marquette Retirement Living, Inc.
- Riley Cheer Guild
- Riley Children's Foundation: Riley Professional Advisors Council
- Southern Illinois University Carbondale External Advisory Finance Board
- Sport Boards (Cross Country) for Indy Genesis
- St. Luke's Catholic Church Finance Council
- The Nature Conservancy of Indiana
- Trinity Episcopal Church Legacy Fund Trustees
- United Methodist Foundation of Indiana

ORGANIZATIONS SUPPORTED ▶

In 2023, Goelzer provided financial support to 62 community organizations. The list that follows is a representative list of 47 of those organizations.

- American Pianists Association
- Aspire Indiana Health
- Association of Business Administrators of Christian Colleges
- Big Brothers Big Sisters of Central Indiana
- Brown County Community Foundation
- Camptown, Inc.
- Children's Museum of Indianapolis
- Collaborative Women in Investment Management
- College Mentors for Kids, Inc.
- Conner Prairie
- Cookies for Kids' Cancer
- Cornea Research Foundation of America
- Dayspring Center
- Dove Recovery House for Women
- Early Learning Indiana, Inc.
- Edna Martin Christian Center
- Firefly Children & Family Alliance
- Foster Success
- Gleaners Food Bank of Indiana
- Hawthorne Community Center
- Hendrick's County Historical Museum
- Herron Preparatory School
- Holliday Park Foundation
- Independent Colleges of Indiana
- Indiana Historical Society
- Indiana Humane Society
- Indiana Landmarks Foundation
- Indiana Philanthropy Alliance
- Indiana Sheriffs' Association
- Indianapolis Neighborhood Housing Partnership
- Jameson Camp
- Jewish Community Center
- Jewish Federation
- Junior Achievement of Central Indiana
- New Hope of Indiana
- Orchard School
- Random Acts of Flowers
- Riley Cheer Guild
- Rush County United Fund
- St. Francis Soccer Club
- St. Richard's Episcopal School
- STEM Connection
- Sycamore School
- TeenWorks
- The Villages of Indiana
- Tindley Athletics
- United Way of Central Indiana



Donald J. Hutchinson
 Managing Director,
 Institutional Advisory Services

“ Our Institutional Advisory Services team specializes in providing comprehensive outsourced chief investment officer services to endowments, foundations, non-profits, and other institutions. We believe that providing comprehensive services means being a true partner to our institutional clients.

As a partner, we understand that non-profits exist to serve others in need. We work to help protect and build clients’ financial resources so that they can fulfill their missions for many years to come, but our comprehensive support extends well beyond investment performance.

We know that the leaders of our non-profit organizations are called to make our communities better, safer, and more inclusive by helping their beneficiaries get the resources they need to achieve their true potential. Goelzer’s core purpose is a resounding call to support those leaders and their organizations.”

Thank you to our INSTITUTIONAL CLIENTS



United Way
 of Central Indiana



THANK YOU LILLY ENDOWMENT



These non-profits excel at serving so many in need in Indiana and beyond. And many of these organizations, along with countless others, are able to plan and provide

their services more effectively because of the incredible support of the Lilly Endowment.

The Lilly Endowment endeavors to help individuals reach their full potential, families to thrive, and communities to flourish through grants to a range of charitable organizations. Since its founding in 1937, the Lilly Endowment has disbursed \$13.7 billion in grants to 10,722 charitable organizations, most of which are in Indiana. In 2022 alone, the Lilly Endowment paid \$1.3 billion in grants and approved \$1.2 billion in new grants!

We are amazed by the Lilly Endowment’s support, and we are especially mindful of the importance of helping to manage the grant funds that the Lilly Endowment entrusts to our clients.



St. Richard's
 Episcopal School

This is a representative list of our institutional clients. Clients included on these two pages were chosen based on their capacity as institutional clients. Inclusion here is not intended to convey whether they approve of the advisory services we provide.

Names and logos of third parties on these two pages and throughout this report are the property of their respective owners and may also be trademarks.

100%

of our team members supported the United Way of Central Indiana in 2014, 2015, 2016, 2017, 2018, 2019, 2020, 2021, 2022, & 2023!



Our Commitment to THE UNITED WAY

▼ ANOTHER RECORD BREAKING YEAR

Goelzer is proud to support the United Way of Central Indiana in its effort to accelerate financial stability and upward mobility for individuals and families living in or near poverty and striving for a brighter future.

This year, 100% of our team members supported our United Way campaign for the tenth year in a row! Additionally, Goelzer is proud to share that we have raised a record amount of funds in our campaign again this year.

These funds will help the more than 244,000 households in Central Indiana who live in or are one emergency away from poverty or will support other causes selected by our team members.

For more about how to give to the United Way of Central Indiana, please visit uwci.org/give.



TeamGoelzer was proud to participate in the United Way of Central Indiana's Go All In Day at the Boys & Girls Club of Morgan County in June! Our team, led by Heather Tilton, helped create an outdoor mental health space by pulling weeds, picking up trash, putting together fencing, and much more.

SPIRIT UNITED AWARD FINALIST

Spirit United is United Way of Central Indiana's most prestigious corporate recognition. It celebrates companies who have consistently supported and generously donated to United Way and know that it also takes volunteering and advocacy to improve communities.

Goelzer was proud to be selected as a finalist for the award in April, and we hope to win this prestigious award in 2024!

Needs ▼

244,000
Central Indiana households are in or one emergency away from poverty.

70,760
of these households have children.

Focus Areas ▼

BASIC NEEDS
to provide essential services to our neighbors in need

EARLY CARE & LEARNING
to increase literacy outcomes and learning success for young children

ECONOMIC MOBILITY
to increase earnings and build employment pathways

SAFE & AFFORDABLE HOUSING
to increase housing security and reduce homelessness

Working with Associations TO SERVE OUR COMMUNITIES



Goelzer serves as an investment consultant to the Indiana Sheriffs' Association (ISA) and to 34 county sheriffs across Indiana, and we support all 92 sheriffs, deputies, and other employees through our partnership with the ISA.

Goelzer hosted our county sheriffs at a Day at the Track on Carb Day this year, and we also participated in the ISA's Summer and Fall conferences.

As an extension of our work with the ISA, we also attended the National Sheriffs' Association conference in Michigan.



In 2023, Goelzer entered into a new relationship with the Association of Business Administrators of Christian Colleges.

Brett A. Stehl, Institutional Consultant, who leads our engagement with ABACC,

attended the ABACC conference in Kissimmee, Florida in March.

In November, Helena Ocampo, Senior Portfolio Manager, also presented a webinar to ABACC members focused on Women in Leadership. In her presentation, Helena explored how mentorships and intentionality can help pave a route to effective leadership.



The Indiana Chamber of Commerce plays a critical role in making Indiana a better place to live and work.

In 2023, Chris W. Cotterill, Chief Operating Officer, was selected to serve as chair of the Economic Development

Policy Committee and also asked to serve on a special Tax Advisory Council to help analyze changes being considered to Indiana's tax system.

In June, Chris and Gavin W. Stephens, Director of Portfolio Management, presented an economic overview focused on today's challenges and an AI-driven future to the Indiana Business Tax Conference.



The Indiana Philanthropy Alliance (IPA) exists to champion, support, and connect members as it transforms Indiana through effective philanthropy.

Goelzer is a major supporter of the IPA and the John Mutz Philanthropic Leadership Institute, which identifies and develops transformational philanthropic leaders.



In June, Janet S. Sweet, Senior Institutional Consultant, and Gavin W. Stephens spoke to the Mutz Leadership class about ESG investing.



The Independent Colleges of Indiana (ICI) represents Indiana's 29 private, nonprofit, regionally-accredited colleges and universities. In 2023, Goelzer became a supporter of the ICI.

We proudly provide investment management services to Wabash College, which is an all-male, nationally-ranked liberal arts school.

Many Goelzer team members are alums of ICI member institutions, including Anderson University, DePauw University, Hanover College, Huntington University, Indiana Wesleyan, University of Indianapolis, and Wabash College.

Special CONVERSATION *with Marianne Glick & Yvonne Shaheen*

As part of our engagement with endowments, foundations, non-profits, and other institutions, we hosted Marianne Glick and Yvonne Shaheen for a moderated conversation in November to focus on their thoughts on community engagement and philanthropy.

Marianne Glick led Glick Training Associates for decades and now serves as board chair of the Glick Family Foundation. She is the president of the board of TeenWorks, which she founded. Marianne has also supported many other organizations, including the United Way of Central Indiana, Central Indiana Community Foundation, Ascend, Ivy Tech, Goodwill Industries of Central and Southern Indiana, Women's Hospital, Big Brothers Big Sisters of Central Indiana, and the Habitat for Humanity.

While leading one of Indiana's largest electrical contractors, Long Electric, **Yvonne Shaheen** has dedicated herself to improving our community by supporting many organizations, including the Indy Chamber, the Arts Council of Indianapolis, the Indianapolis Symphony, The Children's Museum, Gleaners Food Bank of Indiana, WFYI, and the University of Indianapolis.

More than a hundred non-profit leaders, board members, community leaders, and friends joined us for this special event.



Marianne Glick (left) and Yvonne Shaheen (right) with Chris Cotterill, who served as our moderator.



Special Tribute to Joe Barnette, Marianne Tobias, & Jerry Semler



At the event, we paused to honor three pillars of our community who we lost this year: Joe Barnette, Marianne Tobias, and Jerry Semler. Andy Concannon, our CIO, offered comments in their honor.

Collectively, this group served on 79 civic and non-profit boards—that we were able to identify. And they served not in a small way, as they often served as board chair and their service frequently covered long periods of time. Our community is better off for the contributions they made over their long and successful lifetimes.

There are a few lessons to take away from their service: That caring about people matters. That lifelong learning matters. And that making a difference matters. And if we can turn those lessons into actions, we will honor their legacy of making our community a better place than they found it.

The full video of the event, along with a short highlights video and a video of the tribute, is available at goelzerinc.com/insights_post/special-event-with-glick-shaheen/

Two Decades of SUPPORTING WFYI



Goelzer Investment Management's longstanding commitment as an underwriter for WFYI, spanning over two decades, is a testament to the values that we share with WFYI.

At the heart of our relationship with WFYI is a shared dedication to community engagement and the belief that informative programming is an essential component of a thriving society. Goelzer recognizes the important role that WFYI plays in fostering an informed and educated citizenry with its unbiased news, educational content, and diverse programming.

Goelzer's multi-decade underwriting commitment to WFYI is a story of shared values, community dedication, and the recognition that responsible corporate citizenship involves investing in the well-being and intellectual enrichment of the communities we serve.

For information on how to support WFYI, please visit wfyi.org/support.

“We partner with benevolent organizations that are best equipped to make a difference in the community and which are most effective in achieving their mission. WFYI provides trusted journalism, inspiring stories, and lifelong learning. We consider them one of our essential partners in our efforts to enrich lives in our community.”
— Gregory W. Goelzer, Chief Executive Officer

Thought LEADERSHIP

WE SHARE OUR INSIGHTS TO HELP EMPOWER OTHERS

Our Investment Management team's insights into the economy and markets, paired with the expertise of our private wealth advisors and institutional consultants, position us to provide useful and timely thought leadership to our clients. We believe it is part of our corporate responsibility to share useful insights more broadly.

Our monthly *Insights* pieces cover a variety of topics, including our long-term capital markets expectations, how high net worth individuals can plan to protect their legacy through effective planning, and how institutional clients can nurture their base of donors and establish effective spending policies. Umesh Nathani also wrote a very interesting piece on Artificial Intelligence from an investment perspective.



From time to time, we are asked to share our thoughts with the press, including *Barron's*, *CNN Business*, *The Bond Buyer*, *Reuters*, and *The Wall Street Journal*. And, more recently, Director of Wealth Planning S. Michelle Jann was asked by *MarketWatch* to comment on tax planning strategies. To read the published work from Goelzer or about our press coverage, please visit goelzerinc.com/insights.

Team GOELZER

FIRST YEAR OF SERVICE

On a team member's first work anniversary, they earn their very own Goelzer bobblehead! This year, we celebrated seven such anniversaries.



Michelle J. Maye
August



Gaye B. McKinney
November



Christy J. Rogers
June



Brett A. Stehl
May



David S. Alexander
May



James A. Keyser
November



Angela Y. Morphey
February

QUARTERLY EXCELLENCE AWARDS

We honor team members who have provided particularly excellent contributions during the past quarter and who consistently provide high-quality work product and enhance the office with their positive attitudes. We are proud to recognize all of the Quarterly Excellence Award winners from the past four quarters.



Chris A. Ryker



Craig A. Maschmeyer



Janet S. Sweet



Leanne S. Fishel



Gaye B. McKinney



James A. Keyser



Megan M. French



Suzy S. Goelzer

YEARS OF SERVICE

We also honor those who have served Goelzer for five years and then each five years thereafter (10, 15, 20, etc.). In 2023, we celebrated four team members who reached these milestone anniversaries.



Heather A. Tilton
20 years



Chris A. Ryker
15 years



Suzy S. Goelzer
5 years



Helena Ocampo
5 years

Goelzer IN OUR COMMUNITY



◀ Brett McKamey and Lisa Cantú participated in a 24-mile bike ride along with family and friends through Rush County in support of the Willkie Days Covered Bridge Ride FIVE in 50 in September.

The ride helps promote local businesses, active living, and physical fitness while showcasing the beauty of Rush County and its historic covered bridges. *For more information, please visit willkiedays.com.*



▶ Gaye McKinney, Aimee Deveau, Umesh Nathani, Brett McKamey, Dean Weseli, and Heather Tilton had a great time with family and friends attending the 22nd Annual Holliday Park Trail Run in March.

Goelzer has supported this event for 16 years, and we are proud to help support the environmental education programming needs, capital projects, and trail renovations at Holliday Park. *For more information, please visit hollidaypark.org/events-programs/trail-run.*

▶ Kory Fay, Heather Tilton, Brett McKamey, Aimee Deveau, Lamica Simmons, Gaye McKinney, and Christy Rogers volunteered along with members of their families with Camptown, Inc. at its 2023 Natural Wonders Day Camp in July.

Camptown's mission is to challenge, mentor, and teach youth about life through outdoor adventure and nature programs that help build confidence, character, and hope. *For more information, please visit camptown.org.*



▼ Michelle Jann, Christy Rogers, Aimee Deveau, Lamica Simmons, Suzy Goelzer, and Helena Ocampo enjoyed attending the United Way of Central Indiana's Speakers Series in October. The event focused on the evolving role of gender equity in the workplace from the perspective of five leaders in our community.



◀ Chris Cotterill and his wife, Melissa Cotterill, enjoyed learning more about the life-changing work being done by Goodwill of Central & Southern Indiana at Goodwill's Unboxed event in September. "The Goodwill Guy" also made a special appearance again this year!

Goodwill changes lives every day by empowering people to increase their independence and reach their potential through education, health, and employment. *For more information, please visit goodwillindy.org.*

▶ A big contingent of TeamGoelzer helped set up classrooms at Early Learning Indiana's Day of Impact in September! Jeff Bush enjoyed a special opportunity to read to a class of young students! Early Learning Indiana's mission is to ensure every child is empowered with essential skills to be successful in kindergarten and beyond. *For more information, please visit earlylearningin.org.*



▶ Umesh Nathani joined in on the fun and friendly competition during Edna Martin Christian Center's 5th Annual Monopoly Tournament fundraiser in October.

The Edna Martin Christian Center's mission is to invest in the lives of all in Martindale-Brightwood and surrounding neighborhoods through community-driven opportunities that foster stability, growth, and a vision of hope. *For more information, please visit ednamartinc.org.*





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