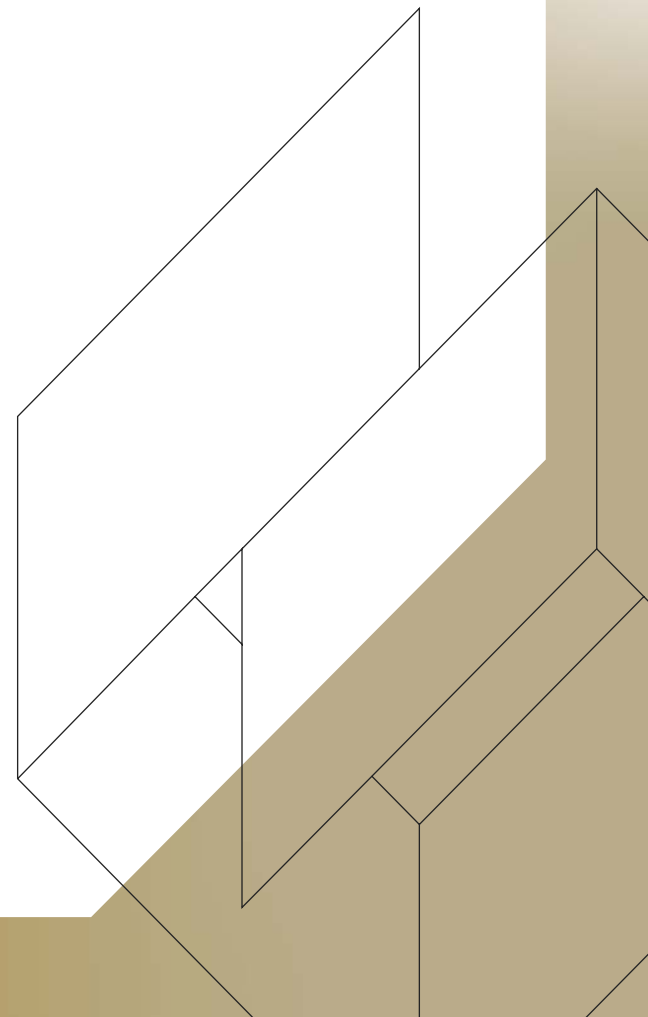


2024 COMMUNITY ENGAGEMENT REPORT

ENRICHING LIVES



A MESSAGE FROM OUR CEO

After more than thirty years in our prior office space, we relocated a few months ago to the Carmel Arts & Design District. We are now located more conveniently to many of our clients in Central Indiana, and our new office has been designed to enhance our services to our clients. The future here is bright indeed!

As with any move, we have reflected on the past 55 years of our firm. As much as things have changed over that time, the fundamentals have not. Our Core Purpose is to enrich the lives of our clients, colleagues, and community. And the Goelzer Experience is rooted in one word: Respect. Respect is at the heart of our values, which guide us in all that we do.

This year, our *Enriching Lives* report shares more about our firm's history. Ours is a history marked by growth in the number of clients served, the assets we are entrusted to manage, the services we offer, and the impact we make. We also share our investment philosophy, which guides our research-intensive approach to active management of our clients' portfolios.

With the guiding light of our Core Purpose and Core Values, the bedrock strength of our history, and the energy and focus of our team members, 2024 has been an exciting and productive year. In the pages that follow, you will see how we expanded the impact we are making in the communities in which we live, serve, and work.

Of course, none of this would be possible without the continued trust of our clients, the amazing capabilities of our team members, and the incredible capabilities of our partners in the community.

As we look ahead to the new year, we do so with respect for what we have accomplished and with optimism about what we will achieve together in 2025.



GREGORY W. GOELZER
Chief Executive Officer



TABLE OF CONTENTS

OUR CORE PURPOSE

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

OUR CORE VALUES

 TRUST

 INTEGRITY

 RESPECT

 THOUGHTFULNESS

 COMMITMENT

02

A Message from Our CEO

03

Our Core Purpose & Values

04

Our History

05

Our Investment Philosophy

06

The Goelzer Experience

08

Engaging in Our Communities

12

Thank You to Our Institutional Clients

14

The United Way of Central Indiana

16

Women in Investment Management

18

Indiana Philanthropy Alliance

19

Serving Those Who Protect & Serve

20

Team Goelzer: A Best Place to Work

22

Board Service

23

Organizations We Support

◀ Mayor Sue Finkam cutting the ribbon with Greg Goelzer at the Grand Opening of our new office in the Carmel Arts & Design District in November.

GOELZER IS PROUD TO BE A MEMBER OF THESE ORGANIZATIONS



OUR HISTORY

FOUNDING & EARLY EXPANSION (1969-1989)

Our firm was founded in 1969 by Don W. Goelzer as Goelzer & Co., initially focusing on brokerage and market-making services. We expanded our services to include business valuation, estate planning, and ESOP valuations. In 1981, Goelzer registered as an SEC-registered investment advisor, transitioning to fee-based discretionary asset management. By 1989, after acquiring Collett & Co., assets under management grew to \$80 million.

GROWTH & TRANSITION (1990-2000)

We launched our Core Equity Strategies in 1990, laying the foundation for our investment approach. In 1992, our firm rebranded as Goelzer Investment Management. By 2000, our assets under management grew to over \$400 million. During this time, we expanded our client base to include more institutions alongside individual and family clients.

CHALLENGES & RESILIENCE (2001-2007)

Goelzer weathered the dot com bubble and increased assets under management to more than \$500 million. We focused on scalability, making key hires, and investing in technology. In 2007, Goelzer sold its valuation division, to focus on investment advisory services. In 2005, we launched our Rising Dividends Equity Strategy.

STRATEGIC EXPANSION & PLANNING (2008-2013)

During the 2008 downturn, we strengthened our team and prepared for growth. Assets under management surged from \$686 million in 2011 to \$1.2 billion by 2013. During this period, we set a long-term goal of reaching \$10 billion in assets under management by 2033.

MODERNIZATION & SPECIALIZATION (2014-2024)

In 2014, Goelzer exited the broker-dealer space, focusing exclusively on fee-only advisory services. We also formalized our comprehensive wealth advisory services for private clients and our Institutional Advisory Services outsourced chief investment officer (OCIO) model.

We launched our Core Blend ESG Equity Strategy in 2016 and Alternative Fixed Income Strategy in 2020. In 2021, we formalized our G-PRO Sports services, and, in 2023, we expanded our Goelzer Private Office services. In 2024, we relocated to the Carmel Arts & Design District.

Over this period of time, assets under management increased to more than \$3.5 billion.

- 1969 Founding of Goelzer and Co., Inc.
- 1971 First Institutional Client
- 1981 SEC Registered Investment Advisory Firm
- 1989 First Fee-based Discretionary Client
- 1990 Launched Core Equity Strategies
- 1992 Repositioned Goelzer & Co. as Goelzer Investment Management
- 2005 Launched Rising Dividends Equity Strategy
- 2009 Launched Non-Traditional Assets Strategy
- 2014 Formalized Goelzer Private Client Comprehensive Wealth Planning Group
- 2014 Formalized Goelzer Institutional Advisory Services OCIO Service Model
- 2016 Launched Core Blend ESG Equity Strategy
- 2020 Launched Alternative Fixed Income Strategy
- 2021 Formalized G-PRO Services for Professional Athletes
- 2023 Expansion of Goelzer Private Office Services

Brett McKamey, our President since 2003, joined Goelzer on January 2, 1990. As a co-founder of our firm as we know it today, Brett has been a leading force in our transition from a broker-dealer to a fee-based registered advisory firm and the expansion of our comprehensive wealth planning and institutional advisory services.

On his 35th anniversary at Goelzer, Brett will transition from President to serve as a Senior Partner. Brett will be succeeded by Chris Cotterill, our Chief Operating Officer. In his new role, Brett will continue to advise many of our highest-net-worth private clients, focus on initiatives that support the needs of our clients and position our advisors and consultants for success, and serve as an ex-officio member of our leadership team.

All of us at Goelzer thank Brett for his unwavering commitment to strive for positive outcomes and an awesome client experience, and we look forward to the years ahead together.



Brett D. McKamey

Our investment philosophy is rooted in a disciplined, unemotional approach that prioritizes resilience and growth. We focus on proven principles: responding to actual market events rather than speculating on the future, investing with a long-term perspective, and building diversified portfolios over taking concentrated risks.

OUR INVESTMENT PHILOSOPHY

Avoid the unknown and make known the productive.

Avoid investing in things you do not understand. But learn about promising investments unfamiliar to you. Above all, have clear rationale for all investment judgments.

A disciplined investment plan allows one to take advantage of what has happened instead of speculating on what may happen.

Instead of trying to predict whether the stock market will rise or fall, look at what has recently occurred and how that has affected your portfolio relative to its plan. For example, if a decline in the stock market has left your stock portfolio below its target weight, use that as a signal to add to stocks.

Avoid investments that offer only vague prospects of positive returns.

We are investors, not speculators. We seek investment opportunities that are biased toward positive returns from growth or income—not simply the hope that others may eventually pay a higher price for that opportunity.

Invest in a manner that makes time your friend, and more time a better friend.

Assets such as a diversified portfolio of high-quality stocks and bonds tend to produce positive results over longer time periods even though results may be negative in the short-term. Investing with a long-term horizon allows you to capitalize on the benefit of time.

Concentrated holdings have made some investors very wealthy. Well-diversified portfolios have made, and kept, many more investors wealthy.

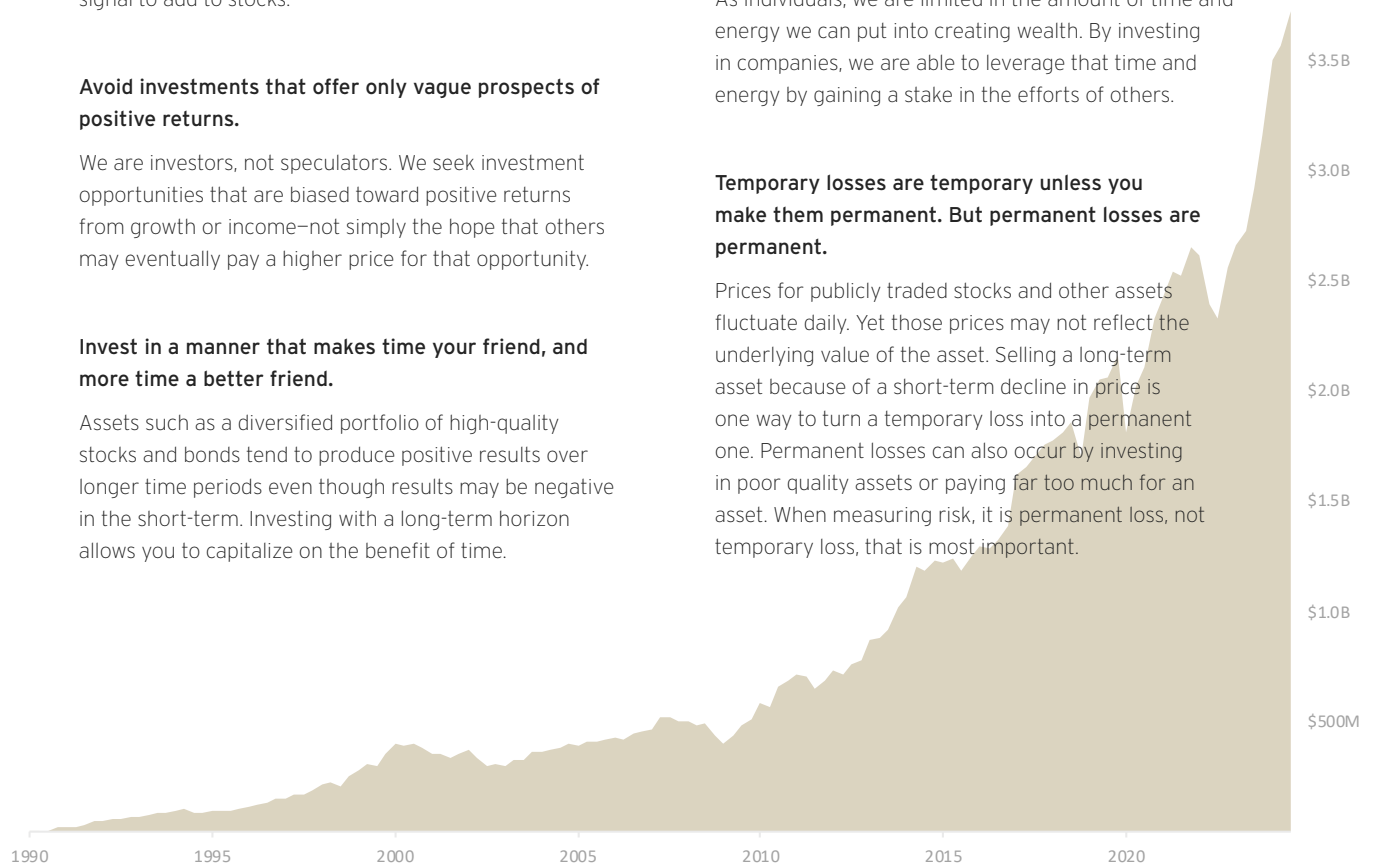
Large fortunes have been made by those owning concentrated stakes in highly successful companies. But concentrated holdings have caused large losses for far more investors. Owning a diversified portfolio means you will never have the optimal result but also that you will never have the worst result.

Equity ownership has been a proven path to wealth creation because it allows you to participate in the fruits of other people's work and innovation.

As individuals, we are limited in the amount of time and energy we can put into creating wealth. By investing in companies, we are able to leverage that time and energy by gaining a stake in the efforts of others.

Temporary losses are temporary unless you make them permanent. But permanent losses are permanent.

Prices for publicly traded stocks and other assets fluctuate daily. Yet those prices may not reflect the underlying value of the asset. Selling a long-term asset because of a short-term decline in price is one way to turn a temporary loss into a permanent one. Permanent losses can also occur by investing in poor quality assets or paying far too much for an asset. When measuring risk, it is permanent loss, not temporary loss, that is most important.



Assets Under Management as of September 30, 2024. Source: Goelzer Investment Management.

THE GOELZER EXPERIENCE

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, Live.**

INSTITUTIONAL ADVISORY SERVICES

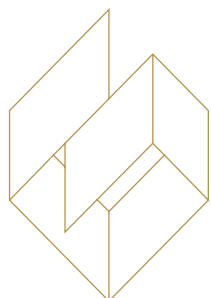
for endowments, foundations, nonprofits, and governmental entities



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

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

GOELZERINC.COM/INSTITUTIONAL-INVESTORS



Goelzer serves clients in

37

STATES

WEALTH ADVISORY SERVICES

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 focusing on portfolio risk, asset allocation, and dynamic portfolio solutions across various asset classes.

GOELZERINC.COM/WEALTH-ADVISORY



GOELZER PRIVATE OFFICE

for ultra-high-net-worth individuals and families

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

- 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.

GOELZERINC.COM/PRIVATE-OFFICE



G•PRO SPORTS

for sports-focused organizations and 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.

GOELZERINC.COM/GPRO



RESPECT

ENGAGING IN OUR COMMUNITIES

- Several members of Team Goelzer enjoyed attending **Jameson Camp's** annual breakfast in May. Executive Director David Ramsey, center, is pictured here with our colleagues.



- James Keyser, Jeff Borgert, Lamica Simmons, and Kory Fay had a great time representing Team Goelzer at **Firefly Children & Family Alliance's** Young Professionals Advisory Board's 13th Annual Trivia Night in April.



- Greg Goelzer enjoyed supporting the **Brown County Community Foundation's** 27th Annual Morel Mushroom Sale in memory of Howard Hughes and Bob Kirlin in June.



- Suzy Goelzer joined IndyHumane's Nikki Miller, Director of Corporate Relations & Community Outreach, at its **Putts for Paws** golf outing at Prairie View Golf Club in June.



Team Goelzer had a great day fishing, canoeing, orienteering, and playing water games with the young campers at **Camptown** in June.

Team Goelzer showed our support for the **Indianapolis Neighborhood Housing Partnership (INHP)** at its community breakfast in July.



Team Goelzer had a great time attending the 24th annual **Holiday Park Trail Run** in March. Goelzer has supported this special event for 18 years, and we are proud to help maintain the amenities at Holiday Park again this year.



Don Hutchinson enjoyed connecting with Washington Commanders NFL player, Jeremy Chinn at his annual football camp for Indianapolis and Fishers youth in June. More than 150 young athletes participated in football drills and exercises at **Jeremy Chinn's Free Football Camp**.



Goelzer was proud to sponsor **Safe Families for Children's** Evening with the Stars event in June.



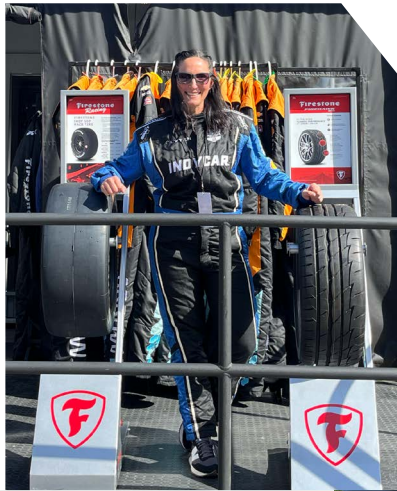
Team Goelzer rolled up our sleeves in September for **Early Learning Indiana's** annual Day of Impact by helping to stain fence and install chain link privacy slats at the Lilly Family Center.



Team Goelzer showed up in force to support **New Hope of Indiana** at its Silver Cup Celebration Luncheon in August.



Aimee Deveau raised money to support the **United Way of Central Indiana** and earned a thrilling experience to have an IndyCar driver drive her at 180 mph around the Indianapolis Motor Speedway in October.



Umesh Nathani, Brett McKamey, and their spouses enjoyed attending the Sunflowers at Sunset event in September to celebrate **The STEM Connection's** 10th anniversary.



Lisa Cantú and her sister Paula enjoyed a 24-mile bike ride through Rush County in support of the 6th annual **Willkie Days Covered Bridge "Ride Five in 50"** in September.



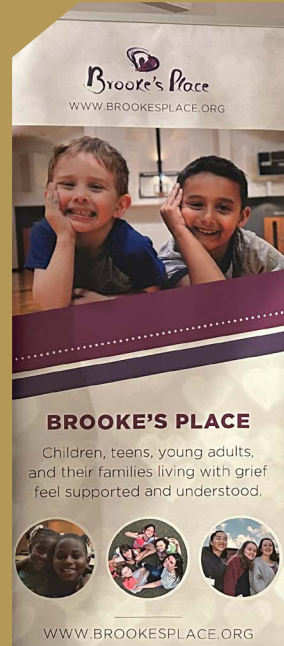


Team Goelzer enjoyed attending the football-themed fundraiser for **Big Brothers Big Sisters of Central Indiana** in September.

Many members of Team Goelzer supported **TeenWorks** at its 6th annual Futures Breakfast held at the Indiana Roof Ballroom in November.



Lisa Cantú and Greg Goelzer attended **Gleaners'** inaugural Huddle Against Hunger at Lucas Oil Stadium in October to help raise funds to provide fresh, healthy foods to those facing hunger.

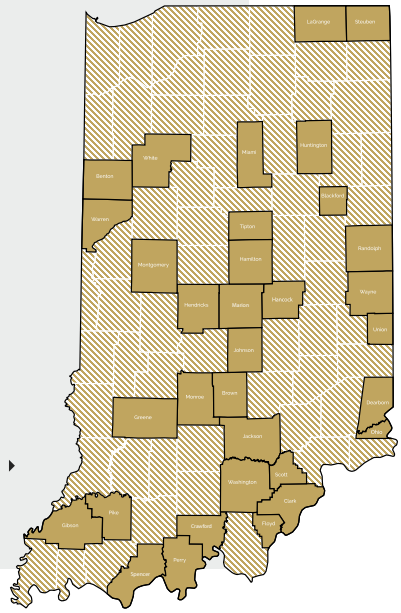


Brandon Watson, Sara Omohundro, and Michelle Jann supported **Brooke's Place** at its Legacy of Hope Breakfast in November.

THANK YOU TO OUR INSTITUTIONAL CLIENTS

Our Institutional Advisory Services team provides a premier suite of consulting services to help protect and grow our clients' financial resources so that they can focus on fulfilling their missions.

Serving institutions across Indiana ▶





United Way
of Central Indiana



THE ORCHARD SCHOOL



Big Brothers
Big Sisters.
OF CENTRAL INDIANA



ASSOCIATION OF
ANGLICAN
MUSICIANS
Serving the Episcopal Church
FOUNDED 1966



INDIANA PUBLIC RETIREMENT SYSTEM



EDNA MARTIN
CHRISTIAN CENTER



NHI
NEW HOPE OF INDIANA



INDY
CHAMBER



Sycamore
School



INvested



Volunteers
of America
OHIO & INDIANA



TRI
SIGMA



Early Learning
INDIANA



JAMESON CAMP
Get outside. Grow inside.



ISA



St. Richard's
Episcopal School



Aspire
Indiana Health



INDIANA
YOUTH
INSTITUTE
Championing Kids. Strengthening Communities.



FIREFLY
Children & Family Alliance



Riley
Cheer
Guild



Hawthorne
the Heart of the Community

THANK YOU 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 more than \$15 billion in grants to more than 11,000 charities.

Many of the nonprofits listed throughout this report are able to provide critical services because of the incredible support of the Lilly Endowment. As a fiduciary to our clients, we are especially mindful of the importance of carefully managing the funds that the Lilly Endowment entrusts to those we serve.

The information contained in this report is for informational purposes only and should not be considered as a recommendation to buy, sell, or hold any particular security or investment. Past performance is not indicative of future results. All opinions and statements are subject to change without notice and should not be relied upon for making any investment decisions. Please consult with a financial advisor before making any investment decisions.

These two pages include a representative set of our institutional clients. Other organizations mentioned throughout this report may also be clients of Goelzer Investment Management. In all cases, no compensation was provided for their inclusion, no paid testimonials or endorsements were solicited or received in connection with this report, and their inclusion is not intended to convey whether they approve of the services we provide.

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

SPIRIT UNITED AWARD

The United Way of Central Indiana named Goelzer Investment Management its Spirit United award winner in July! The Spirit United Award is the most prestigious recognition the United Way gives to its corporate partners.

This award recognizes businesses, nonprofits, and other groups that go above and beyond in volunteerism, philanthropy, and advocacy efforts to improve the health, education, and financial stability of central Indiana residents. Recipients exemplify a strong culture of giving back and are celebrated for their significant, positive impact on the community.

GOELZERINC.COM/INSIGHTS_POST/2024-SPIRIT-UNITED-AWARD-WINNER



GO ALL IN DAY

The United Way of Central Indiana’s Go ALL IN Day is an annual volunteer event uniting individuals, families, and corporate teams to support local nonprofits and community projects. Through activities like beautifying public spaces, organizing supplies, and assembling kits, volunteers address critical community needs.

Several members of Team Goelzer went “All IN” in June by helping build a new fence for the Boys & Girls Club of Morgan County.



UNITED WAY CAMPAIGN

100%

2014, 2015, 2016, 2017, 2018, 2019, 2020, 2021, 2022, 2023, 2024

Goelzer is proud to support the United Way of Central Indiana in its effort to accelerate financial stability and upward mobility for those 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 eleventh year in a row!

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/DONATE](https://uwci.org/donate).



UNITED WAY CHAMPION OF THE YEAR

- ◀ In March, the United Way of Central Indiana awarded Lamica Simmons, our Human Resources Director, its Champion of the Year Award!

This award recognizes an individual who demonstrates exceptional dedication to advancing United Way's mission and celebrates them for going above and beyond in their volunteerism, leadership, and advocacy efforts, significantly contributing to the well-being of central Indiana communities.

Lamica left Goelzer in August to pursue a post graduate degree in Italy—and we miss her!

WOMEN IN INVESTMENT MANAGEMENT



Goelzer began a new partnership with the **Collaborative Women in Investment Management** initiative in 2021 to support the development of women in the investment management industry and increase networking opportunities and programming for women.

In October, Goelzer hosted a roundtable discussion on Trailblazing Women in Leadership in collaboration with Collaborative WIM. Participants explored key challenges, opportunities, and strategies for driving change and making an impact in leadership roles. Goelzer was also given an award for being a Founding Sponsor of Collaborative WIM.



▶ FOR MORE INFORMATION, PLEASE VISIT [COLLABORATIVEWIM.ORG](https://www.collaborativewim.org).

▼ Sara Omohundro, Investment Strategist, is President and Founder of the **Women Investors Network**, which connects, empowers, and promotes women in the investment industry.



Sara J. Omohundro

FOR MORE INFORMATION, PLEASE VISIT [WOMENINVESTORSNETWORK.ORG](https://www.womeninvestorsnetwork.org).

FAMILY WEALTH ALLIANCE

- ▶ Director of Wealth Planning Michelle Jann and Senior Portfolio Manager Helena Ocampo enjoyed attending the **Family Wealth Alliance's** Elevating Women in Family Wealth conference in Boston in August. Goelzer is a proud member of the Family Wealth Alliance.



SUPPORTING WOMEN-FOCUSED NONPROFITS



- ▶ **Dove House** empowers women to become substance-free, self-sufficient, and healthy by providing safe housing, quality programming, and—above all—hope for the future.

Senior Consultant Janet Sweet has been a board member since 2017 and currently serves as the board treasurer.



- ▶ **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 Cotterill has served on the board since 2023, is a member of the Governance Committee, and chaired the Strategic Planning Task Force. The strategic plan, which included three goals, was released in November.



Chris W. Cotterill

In March, Chris and other members of Team Goelzer spent the day organizing supplies and moving furniture so that Girls Inc. Indy could make better use of its recently renovated offices.

Goal 1
Programming

We can develop and deliver innovative, impactful, and equitable programs that inspire and empower girls to be strong, smart, and bold.

By fostering self-confidence and challenging societal norms, these programs aim to provide every girl with the tools and support she needs to develop the skills needed to thrive in a complex world. The focus is on creating a dynamic, responsive, and transformative learning environment that meets the diverse needs of all participants.

Goal 2
Girls' Voices

We uplift Girls' Voices to empower them to express themselves confidently so their voices are heard and valued in their communities and beyond.

By fostering an environment that encourages self-expression, advocacy, and leadership, we aim to create a platform where girls can share their stories, ideas, and perspectives. This goal is centered on building self-confidence and resilience, supporting girls to challenge norms and make meaningful contributions to their communities.

Goal 3
Growth

We aim to strategically grow our organization by enhancing our external messaging, increasing the retention and recruitment of program participants, and exploring expansion opportunities both within and beyond Marion County.

This growth will enable us to serve more girls, provide them with the tools and support they need to thrive, and solidify our presence as a leading advocate for girls' empowerment. By focusing on these key areas, we will create a sustainable path for long-term success and amplify our mission to inspire all girls to be strong, smart, and bold.

INDIANA PHILANTHROPY ALLIANCE

In October, Director of Strategic Partnerships Suzy Goelzer moderated a panel on “Finding Your Power: Women as Community Leaders” with three community leaders at the Indiana Philanthropy Alliance’s 2024 Philanthropy Leads Conference:

- Mel Raines, CEO & President, Pacers Sports & Entertainment
- Latoya Alexander Botteron, President & CFO, Central Indiana Corporate Partnership
- Heather Jackson, CEO & Co-Founder, iXplore

This inspiring conversation gathered women from across Indiana to share their successes and offer advice on how to rise above barriers while leading.

Goelzer was proud to be a presenting sponsor of this year’s conference, which explores grantmaking practices and the pivotal role of philanthropy in addressing today’s societal challenges.

▶ Suzy Goelzer introducing Claudia Cummings, CEO of the IPA.



Senior Portfolio Manager Helena Ocampo enjoyed presenting “Leveraging Your Portfolio for Good” with our CIO, Gavin Stephens, to the Indiana Philanthropy Alliance’s Mutz Institute class of 2024 in June.

The **John Mutz Philanthropic Leadership Institute** identifies and develops transformational philanthropic leaders in Indiana. This cohort-based program provides a continuing education experience that prepares future leaders for board and executive roles at foundations and corporations.

Goelzer serves as an investment consultant to the Indiana Sheriffs' Association (ISA) and to 31 county sheriffs across Indiana. We also support all 92 sheriffs, deputies, and other employees through our partnership with the ISA.

The ISA exists to promote the general public welfare through the cooperation of the different sheriffs and deputy sheriffs in Indiana in the performance of their duties. Goelzer is the Titanium sponsor of the ISA.

SERVING THOSE WHO PROTECT & SERVE



Greg Goelzer speaking at the ISA's Winter Conference in February and Fall Conference in October.



Elaine Beaty, Greg Goelzer, and other members of Team Goelzer attended the **Central IN Police Foundation's (CIPF) Thanksgiving Breakfast with a Cop** in November.

CIPF fosters community-wide support for law enforcement by supporting traumatically injured officers and their families, providing supplemental resources for officers in the line of duty, and building positive officer-community partnerships.



FOR MORE INFORMATION, PLEASE VISIT
INDIANASHERIFFS.ORG AND CIPF.FOUNDATION.

A BEST PLACE TO WORK

BEST PLACES TO WORK IN MONEY MANAGEMENT

Goelzer was selected again as a 2024 Best Place to Work in Money Management in a nationwide review by *Pensions & Investments*.

FOR MORE INFORMATION, PLEASE VISIT
GOELZERINC.COM/INSIGHTS_POST/BEST-PLACE-TO-WORK-IN-MONEY-MANAGEMENT-2024

BEST PLACES TO WORK IN INDIANA

Goelzer was again named one of the Best Places to Work in Indiana, an annual program created by the Indiana Chamber of Commerce. This is the ninth time in ten years that Goelzer has been selected for this prestigious recognition. This year, Goelzer was ranked in the top ten of all companies with fewer than 75 employees!



FOR MORE INFORMATION, PLEASE VISIT
GOELZERINC.COM/INSIGHTS_POST/BEST-PLACE-TO-WORK-IN-INDIANA-2024

EMPLOYEE OWNERSHIP

Every team member automatically becomes a member of our Employee Stock Ownership Plan (ESOP). Our ESOP, which is 100% company-funded, affords our team members an important retirement benefit and is a critical part of our broader commitment to employee ownership.



Our ESOP is certified by Certified EO, which has rigorous standards for broad-based employee ownership.

FOR MORE INFORMATION, PLEASE VISIT
WWW.CERTIFIEDEO.COM.

In October, we relocated our offices to the vibrant Carmel Arts & Design District. This move brings us closer to many of our clients and offers our team a modern, thoughtfully designed workspace featuring enhanced meeting spaces and state-of-the-art technology to foster collaboration.

As pictured on page 2, we celebrated our grand opening with Mayor Sue Finkam! And as we enjoy the vibrancy of Carmel, Greg Goelzer led our efforts to begin to give back to the Carmel community.



In August, Greg joined Debbie Gangstad of the Carmel Clay Historical Society to sign the beam that will connect the original Monon Railroad Depot to the new Carmel Clay History Museum.

In August, Greg also joined in on the celebration of the grand opening of the Carmel Clay Community Building and the new Carmel Fire Department headquarters.



In November, Greg offered remarks at the Grand Opening Gala for the Carmel Clay History Museum, which Goelzer co-sponsored.

- ▶ We celebrate each team member's first anniversary with a personalized bobblehead to capture their unique personality.

We take our work seriously, but this lighthearted tradition reflects that we try not to take ourselves too seriously!

CELEBRATING THE FIRST ANNIVERSARIES



Nicholas O. Estey



Lisa Cantú



MILESTONE ANNIVERSARIES

We also honor those who have served Goelzer for five years and then every five years thereafter. In 2024, we celebrated seven team members who reached these milestone anniversaries.

5
YEARS

Elaine E. Beaty



Dean P. Weseli



Leanne S. Fishel



Gavin W. Stephens



Janet S. Sweet



Aimee M. Deveau



Kory J. Fay



BOARD SERVICE

In 2024, Goelzer team members volunteered on the boards of the following 25 organizations.



of Greater
Indianapolis



SCHOOL OF
MEDICINE



This list of 41 organizations reflects the diverse range of arts, educational, healthcare, historical, social services, and other organizations we supported financially in 2024.

ORGANIZATIONS WE SUPPORT

A Rosie Place for Children
American Pianists Association
Aspire Indiana Health
Association of Business Administrators of
Christian Colleges
Big Brothers Big Sisters of Central Indiana
Brooke's Place
Brown County Community Foundation
Camptown, Inc.
Carmel Clay Historical Society
Central Indiana Police Foundation
Children's Museum of Indianapolis
Cornea Research Foundation of America
Dove Recovery House for Women
Early Learning Indiana, Inc.
Edna Martin Christian Center
Firefly Children & Family Alliance
Gleaners Food Bank of Indiana
Hawthorne Community Center
Helping Veterans & Families of Indiana
Hendricks County Historical Museum
Herron Classical Schools
Historic Madison, Inc.
Holliday Park Foundation
Indiana Landmarks Foundation
Indianapolis Neighborhood Housing
Partnership
Indianapolis Public Schools Foundation
IndyHumane
Jewish Community Center
Junior Achievement of Central Indiana
Little Red Door Cancer Agency
New Hope of Indiana
The Orchard School
Rush County United Fund
St. Richard's Episcopal School
The STEM Connection
Susie's Place Child Advocacy Center
TeenWorks
The Villages of Indiana
United Way of Central Indiana
Volunteers of America - Ohio & Indiana
Zionsville Parks Foundation





GOELZER
INVESTMENT MANAGEMENT

GOELZER IS NOW LOCATED IN THE

CARMEL ARTS & DESIGN DISTRICT

10 EAST MAIN STREET, SUITE 110
CARMEL, INDIANA 46032

GOELZERINC.COM