

By Olivia Ober

"Team Goelzer" is ready for a St. Patrick's Day run. Many members of the firm participate in charity walks/runs.



# Goelzer Investment Management

## MANAGING MONEY AND COMMUNITY RELATIONSHIPS

"At the end of the day, our culture is based on our values, which is a combination of trust, integrity and commitment. Those are the standards we look for and select in individuals and (with which we) manage our firm. The professional environment is based on respect and having fun at the same time."

—Greg Goelzer, CEO

Employees and family members enjoy an annual Indianapolis Indians' outing at Victory Field.

### Company overview:

- Founded in 1969 by Don Goelzer
- Located in Indianapolis; 23 employees
- Works with individuals, families and institutional investors
- Entrusted with \$1.4 billion in assets
- Serves over 450 clients in 35 states and Europe

### Living well:

The company, located in the Chase Tower in downtown Indianapolis, has an on-site fitness center. The firm allows schedule flexibility so employees are able to work out during the workday and use the health facilities. Goelzer also supports community runs. Six members of the firm will be participating in an upcoming holiday trail run.

### Promoting a work/life balance:

"There is a time to work hard and a time for your families. As long as everything is accomplished ... we do our best to create an environment where they both come first."

### Family fun:

The firm is an Indiana Pacers season ticket holder and supports other organizations, museums and theatres in Central Indiana.

"We often have tickets to those entities that we offer to employees as a thank you throughout the course of the year."

### Community outreach:

Goelzer Investment Management has a theme of connecting its clients and colleagues back to the community. The firm annually supports Gleaners Food Bank through an Indianapolis Colts tailgate. Over a nine-year period, it has donated over 300,000 meals to Hoosiers in need.

"We offer an environment whereby they (employees and clients) have a part in the organizations in which we support not only financially, but also with time given to those organizations. We offer employees time away from the office to support those communities that not only we affirm and support, but those organizations they enjoy."

