



J. ANDREW CONCANNON, CFA

Chief Investment Officer

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As the firm's Chief Investment Officer, Andy Concannon leads Goelzer Investment Management's strong team of professional portfolio managers. Andy initiated and continues to co-manage Goelzer's Rising Dividends Equity Portfolio and Non-Traditional Assets Portfolio. With 23 years of investment management and counseling experience, Andy has focused most of his career advising wealthy individuals and families with unique estate planning, domestic and international tax, and other considerations impacting their investments. He is a respected member of the firm's Executive Management Committee, as well as a member of the firm's Investment Policy and Securities Selection & Review Committees.

Prior to joining Goelzer in April 2005, Andy was the leader of the Indiana Portfolio Management Team at JP Morgan Private Client Services (formerly Bank One), where he was personally responsible for managing assets for individual clients and foundations totaling more than \$1.3 billion. During his 15 years with Bank One, he also served as a Trust Officer of personal trust, individual advisory agency, and qualified plan accounts and was a member of the Investment Review Committee and the Investment Policy Committee. Andy began his investment career in Indiana as a registered representative with K.J. Brown & Company.

A Chartered Financial Analyst ("CFA"), Andy holds a Bachelor of Science degree in Finance from Ball State University where he was selected as the "Outstanding Senior" by the Finance Department and graduated cum laude. Andy is a member of the Beta Gamma Sigma business honorary society. His professional memberships include the CFA Institute and the CFA Society of Indianapolis, for which he serves on the Board of Directors. Andy was recognized in Indianapolis Monthly Magazine as a "FIVE STAR in Client Satisfaction Wealth Manager" in each year of the award's existence, 2008 - 2011.

Andy has served on the Board of Trustees of the Indianapolis Civic Theatre and of the Muncie Jaycee's and currently serves on the Board of Trustees of Jameson Camp and the Indiana University School of Medicine Planned Giving Committee.

Born in Muncie, Indiana, Andy currently resides in Zionsville with his wife Leslie and their two sons.



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