



**DON W. GOELZER**

*Founder and Chairman Emeritus*

Don W. Goelzer founded Goelzer Investment Management in 1969. The firm has since grown to become one of Indiana's leading investment advisory and portfolio management firms, providing comprehensive investment planning, advice, and portfolio management services to affluent individuals and families and to institutional investors. Goelzer Investment Management is an SEC-registered investment advisor and a registered

broker-dealer based in Indianapolis, Indiana. Employee-owned since its founding, the firm currently advises approximately 400 clients across 34 states and Europe. Today, Mr. Goelzer sits on the firm's Board of Directors as Founder and Chairman Emeritus.

Mr. Goelzer began his investment career with Indianapolis-based City Securities Corporation in 1950. As a result of creating and successfully managing the firm's Corporate Trading Department, he was named a Vice President and Department Manager. His responsibilities and expertise grew to include all aspects of investment banking—structuring, pricing, and underwriting municipal obligations, corporate equity and debt issues, as well as private placements. With this wealth of knowledge and 19 years of professional experience, he launched his own firm in 1969.

Born in Wisconsin and raised in Indianapolis, Mr. Goelzer graduated from Indiana University School of business in 1950, before serving on active reserve status as Captain in the U.S. Army. He also participated in continuing education programs at the Indiana University Business School. Related to his support of continuing education in the area of financial analysis, Mr. Goelzer is a member of the CFA (Chartered Financial Analyst) Institute and the CFA Society of Indianapolis. He has also been elected Fellow to the Financial Analysts Federation.

Mr. Goelzer has been actively engaged in the investment industry for more than half a century. He has served the National Association of Securities Dealers as a district committee member from 1972 to 1974. An active member of the National Security Traders Association, he was a founding director of its Indianapolis chapter. He is a past President and Director of the Indianapolis Stock & Bond Club and chaired its Legislative Liaison Committee. In 1993, he was honored as the Club's Man of the Year for his leadership and service to the securities industry. In the May 2002 edition of the Indianapolis Business Journal, Mr. Goelzer was featured in the publication's "Who's Who in Banking and Financial Services".

Mr. Goelzer's numerous activities and endeavors within the community and the financial industry have brought him many awards, including being honored in 2004 by his national fraternity, Sigma Chi, as a "Significant Sigs" in recognition of his business career and investment industry achievements. A dedicated alumnus, Mr. Goelzer has served as Chairman of the Investment Committee of the Indiana University Alumni Association since 1982. He is a past Executive Counsel Member of the Indiana University School of Business and the School of Business Alumni Association. He was a recipient of the Indiana University Alumni Association President's Award in 2008, and in 2009 he received the Z.G. Clevenger Award presented by the "I Association". A past member of the Columbia Club Board of Directors (1978-83), he has also served as a Trustee of the Columbia Club Foundation.

