



**HEATHER TILTON**

*Portfolio Administration Associate*

[hilton@goelzerinc.com](mailto:hilton@goelzerinc.com)

317-264-2686 phone

With nearly 10 years of financial industry experience, Heather is Goelzer's Portfolio Data Specialist, responsible for client portfolio transaction and customer account reconciliation with regard to the firm's portfolio administration system. Her responsibilities also include the monthly "closing" of all performance data files and the production of quarterly client portfolio reports. Heather participates in meetings of Goelzer's Investment Policy Committee, for which she prepares management reports related to individual and aggregate portfolio performance. Heather joined Goelzer's team of client service professionals in 2003. She began her business career with Edison Building Maintenance before serving as an administrative assistant at the Indianapolis CPA firm Zurface, Sanders & Rasor, Inc.

Heather is a 1995 graduate of Southport High School in Indianapolis and completed medical and business accounting courses at Indiana University Purdue University Indianapolis (IUPUI).

She and her husband Chris are the proud parents of two boys. They are very involved with the boys' sports pursuits and enjoy spending time with their family and friends.

