



**THE FINANCIAL PLANNING ASSOCIATION OF GREATER INDIANA**

The primary aim of the Financial Planning Association is to be the community that fosters the value of financial planning and advances the financial planning profession. The FPA's strategy to accomplish its objectives involves welcoming all those who advance the financial planning process and promoting the CFP® mark as the cornerstone of the Financial Planning Association.

---

**OUR MEMBERS:** We have approximately 350 members who are all involved in financial planning throughout the state of Indiana. Our members stretch from Evansville in southern Indiana to South Bend in northern Indiana.

**Please visit our website for more chapter information: [www.fpaindiana.org](http://www.fpaindiana.org)**

---

**NETWORKING BRUNCH/CE FORMS Partnership**

**\$1,500.00**

**MEETINGS**

- **2021 FPA Greater Indiana Meeting Dates:** March 12<sup>th</sup>, May 7<sup>th</sup>, September 17<sup>th</sup>, November 19<sup>th</sup>
- **Meeting Times:** March 6<sup>th</sup> will be from 8:30 a.m. – 12:30 p.m.; May 7<sup>th</sup> and November 19<sup>th</sup> will be from 8:00 a.m. – 1:30 p.m. and September 17<sup>th</sup> will be from 8:00 am. – 4:00 pm.
- **Meeting Locations:** March will be virtual. We are hoping to hold the May meeting at the Forum Credit Union Conference Center in Fishers and the September and November meetings at Barnes & Thornburg (11 S. Meridian Street, Downtown Indianapolis on the 5<sup>th</sup> Floor). This is all dependent on Covid.

**2021 NETWORKING BRUNCH/CE PARTNERS:**

MARCH 2021: VIRTUAL – NO MEETING PARTNER

MAY 2021: FORUM CREDIT UNION

SEPTEMBER 2021: AVAILABLE

NOVEMBER 2021: AVAILABLE

**2020 NETWORKING BRUNCH/CE PARTNERS:**

MARCH 2020: FIRST TRUST PORTFOLIOS

AUGUST 2020: VIRTUAL – NO MEETING PARTNER

SEPTEMBER 2020: VIRTUAL – NO MEETING PARTNER

NOVEMBER 2020: - VIRTUAL – NO MEETING PARTNER

**2019 NETWORKING BRUNCH/CE PARTNERS:**

MARCH 2019: FIRST TRUST PORTFOLIOS

MAY 2019: FORUM CREDIT UNION

SEPTEMBER 2019: WAYPOINT RESIDENTIAL

NOVEMBER 2019: FIRST TRUST PORTFOLIOS



**BENEFITS for 2021 QUARTERLY MEETINGS  
NETWORKING BRUNCH/CE FORMS**

- 1) Announcement and Company Logo\* on the FPA of Greater Indiana website
- 2) Announcement and Company Logo\* within the meeting invitation sent to members and sponsors twice prior to the meeting.
- 3) Announcement and Company Logo\* within the Chapter newsletter sent a few weeks prior to the quarterly meeting.
- 4) Opportunity to speak to the meeting attendees for ten minutes prior to the beginning of the networking brunch.
- 5) Company Logo\* on all CE certificates received by the attendees for each presentation.
- 6) Two 8 1/2 x 11 acrylic holders available for you to supply four sheets (or two that are front and back) with company logo and information provided by you. One will be located on the buffet table and one will be on one of the tables our attendees will be sitting at.
- 7) List of attendees and their contact information from the meeting.
- 8) Invitation to all future meetings / events for the next twelve months.

\* If your company does not have a logo, we will write out your company name as you would like it to read.

For more information or if you have any questions:

Roxanne M. McGettigan  
Chapter Executive  
FPA of Greater Indiana  
226 N. New Jersey Street  
Indianapolis, IN 46204  
317.373.1355  
roxanne.mcgettigan@fpaindiana.org

THE FINANCIAL PLANNING ASSOCIATION OF GREATER INDIANA

NETWORKING BRUNCH/CE FORMS  
PARTNERSHIP ENROLLMENT

DATE: \_\_\_\_\_

Company Name: \_\_\_\_\_

Contact Name: \_\_\_\_\_

Phone Number: \_\_\_\_\_ Cell Phone Number: \_\_\_\_\_

Full Address: \_\_\_\_\_

E-mail Address: \_\_\_\_\_

Web Address: \_\_\_\_\_

Company Name as you would prefer it to appear in print:

\_\_\_\_\_

Please email company logo to Roxanne at [roxanne.mcgettigan@fpaindiana.org](mailto:roxanne.mcgettigan@fpaindiana.org)

- 2020 Networking Brunch/CE Sponsorship Fee: \$1,500
  - March 12, 2021 Quarterly Meeting (networking brunch/CE forms) **VIRTUAL**
  - May 7, 2021 Quarterly Meeting (networking brunch/CE forms) **CONFIRMED**
  - September 17, 2021 Quarterly Meeting (networking brunch/CE forms) **AVAILABLE**
  - November 19, 2021 Quarterly Meeting (networking brunch/CE forms) **AVAILABLE**

**Payment:**

- Check:** made payable to the "FPA of Greater Indiana"
- Credit Card:** Visa / MasterCard / American Express / Discover  
(the 2.50% credit card fee will be added to your total: \$37.50 = \$1,537.50)

Credit Card Number: \_\_\_\_\_

Expiration date: \_\_\_\_\_ Security Code: \_\_\_\_\_

Name on Card: \_\_\_\_\_

Billing Address: \_\_\_\_\_

City, State, Zip Code: \_\_\_\_\_

Phone Number: \_\_\_\_\_ Email: \_\_\_\_\_

**Mail checks to:**

**Roxanne M. McGettigan**  
Chapter Executive  
FPA of Greater Indiana  
226 N. New Jersey Street  
Indianapolis, IN 46204