

From: FPA Greater Indiana roxanne.mcgettigan@fpaindiana.org
Subject: August 13th: You Pick - CE or Professional Development
Date: July 8, 2021 at 10:33 AM
To: roxanne.mcgettigan@fpaindiana.org



**FINANCIAL
PLANNING
ASSOCIATION**

**GREATER
INDIANA**

August 13, 2021
8:20 a.m. - 11:50 a.m.

MJ Insurance
3rd Floor Conference Room

571 Monon Blvd.
Carmel, IN 46032
(in-person only)

**Meeting handouts will be placed on the [FPA website](#)
a few days prior to the meeting.
Feel free to print them and bring the copies with you.**

Please Register Here

THE CONFERENCE ROOM ONLY HOLDS 64 PEOPLE.

**REGISTRATION WILL AUTOMATICALLY CLOSE WHEN WE REACH
MAXIMUM CAPACITY - SO REGISTER NOW!**

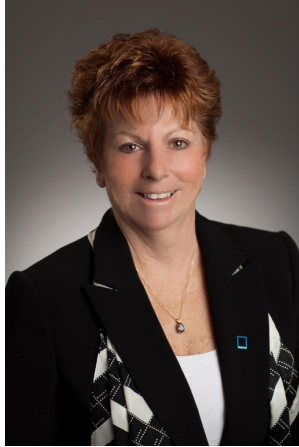
Meeting Agenda:

8:20 a.m. - 8:40 a.m. Grab a seat and your name badge. We will also have a light continental breakfast.

8:40 a.m. - 9:00 a.m. Announcements: Michel Engelen, FPA Chapter President

KEYNOTE

Peggy Marshall Ph.D., CMBC, Global Institute of Organizational Coaching



9:00 a.m. - 9:50 a.m.

(1 hour of CFP CE is pending, and 1 hour of Insurance CE is pending)

"Post Pandemic High-Performance Teams"

Many Financial Service organizations have begun to make plans or already have plans for the post pandemic return to offices which requires both virtual and live interactions with teams and clients. Yet, many of the processes for teams and client engagement are changing from the evolutionary to the revolutionary. Expectations of employees and customers have shifted as these groups have become fluent with digitization, reflected on what motivates them, refocused on the importance of relationships and reevaluated the impact of leadership on successful teams. Tools and resources discussed during this

presentation will differentiate your practice as you engage with in-house teams, your Centers of Influence and your end clients.

Dr. Marshall has extensive experience in change management, leadership development, executive coaching, high performance behaviors, culture development, and team effectiveness strategies. She has a proven track record in guiding the development and success of groups and individuals from the board room to frontline leaders. Dr. Marshall's background includes work in financial services, academia, health care, sales and organizational development. She received her doctoral degree from Antioch University in Leadership and Change with a dissertation focused on outcomes in coaching. Recently she attained a second master's degree from Middlesex University in London with a research project focused on coaching and motivation. She is currently an Honorary Research Fellow with the University of Wales.

The conference room will now be divided into two separate rooms.

You will need to choose which side you will join for the remaining two presentations.

One side will be for Continuing Education and the other side will be for Professional Development.

CONTINUING EDUCATION TRACK

David S. Gilreath CFP[®], Managing Director and Chief Investment Officer

Innovative Portfolios, LLC

PROFESSIONAL DEVELOPMENT TRACK

Caleb Brown, MBA, CFP[®], CEO & Co-Founder

New Planning Recruiting

10:00 a.m. - 10:50 a.m.

(Approved for 1 hour of CFP CE, approval for 1 hour of Insurance CE is pending)

"Market Volatility: Instead of Hiding From it, Harness it to Create Repeatable Income"



Finding income in today's low-interest-rate-world is a challenge for financial planning professionals. Today, diversifying with high-quality bonds could strain a client's lifetime income generation. A constant force in capital markets is volatility, however many advisors strive to avoid volatility, sometimes at the long-term detriment of total return. This presentation focuses on helping investment advisors identify ways to potentially profit from volatility through option-based strategies, as well as what risks to look out for.

As a Managing Director and Chief Investment Officer of Innovative Portfolios, Dave Gilreath shares responsibility for setting investment policy, asset allocation, and security selection for open-end registered investment company funds managed by Innovative Portfolios. He also consults with the clients of Sheaff Brock on overall portfolio construction. Dave has 40 years of experience in the financial services industry.

Since 2002, Dave has been writing for the financial services industry. He is a featured contributor giving money management advice in *Market Moves*, an investment column for ABCNews.com as well as CNBC.com's *Financial Advisor Hub*.

10:00 a.m. - 10:50 a.m.

"Recruiting and Managing Talent in a Post COVID-19 World"



Recruiting and hiring for your firm can be a challenging and time-consuming process, but it does not have to be! Caleb Brown, nationally known expert and Co-Founder & CEO of New Planner Recruiting, shares what he has learned over 10 years of recruiting financial planning talent for firms across the country and how the recent pandemic will impact hiring for years to come. Attendees will gain his insights into understanding the next generation of financial services professionals, crafting a unique position description so you will stand out, where to source candidates to build a pipeline, how to effectively screen candidates to ensure they are a good fit for your firm, compensation data and best practices, successfully integrating a new hire into your firm, and strategies for retaining them.

Caleb is the host of the New Planner Podcast, Co-founder and CEO of New Planner Recruiting, a recruiting firm that specializes in sourcing, screening, and integrating financial planners in financial planning firms nationwide. He was named the Next Generation Influencer by Financial Planning magazine, one of the top 25 most influential people in the industry by Investment Advisor, and Investment News 40 under 40. He is a graduate of the Texas Tech Personal Financial Planning Program

recent Personal Financial Planning Program and spent over five years in an RIA firm in North Texas helping a sole practitioner transition the firm to an ensemble model.

Break for 10 minutes

CONTINUING EDUCATION TRACK

Robert DeRochie, Senior Vice President | Client Portfolio Manager, Fixed-Income

First Trust

11:00 a.m. - 11:50 a.m.

(Approved for 1 hour of CFP CE - First Trust will be filing the CE)

"Fixed Income ~ Where's the Yield? And Will it Ever Come Back?"



Bob will provide his outlook for inflation, interest rates and the broad fixed income markets. He will cover areas of opportunity and potential pitfalls in the bond market today.

Bob is Senior Vice President and Client Portfolio Manager of Fixed-Income. Bob has over 25 years of portfolio management and investment experience and has a strong background in asset management for institutional clients and credit analysis.

PROFESSIONAL DEVELOPMENT TRACK

Diane Wingerter, Founder & CEO

Totally Exposed, LLC

11:00 a.m. - 11:50 a.m.

"Uncover.Rediscover.You"



Fear, Insecurity or Just Simple Writer's Block May Be Costing You Hundreds, Thousands or Even Your Next Customer!

Marketplace competition is fierce and you must know how to position yourself to win market share! This interactive presentation will provide you the points you need to objectively review your existing business bio OR to craft a fresh one from a blank canvas.

Diane inspires others to work hard, stay humble & make a difference. "Change your

Before joining First Trust, Bob was a Senior Vice President, Portfolio Manager and Credit Analyst for Stonebridge Advisors LLC, a firm which specializes in the management of preferred securities. He also has prior experience as a Chief Financial Officer and managed an extensive portfolio of fixed-income assets, including a large component of preferred securities.

Bob received his BS in Finance and Economics from Alfred University, Alfred, NY and his MBA in Finance from the University of Bridgeport.

mindset and change your outcome! There is a huge difference between knowing WHAT needs to be done and knowing HOW to go about doing it! Mentorship, guidance, and wisdom should be shared with others--whom you have the power to influence--so they are equipped to seize both personal and professional opportunities.”

Throughout Diane’s extensive entrepreneurial background, she owned 9 enterprises including a Specialty Retail Chain. She is proud of the fact that she hired over 1,900 employees, during her corporate and entrepreneurial endeavors. A common thread among her existing Marketing & Consulting enterprises is highlighting how individuals ‘arrived’ at where they are, how they are unique in the marketplace and how they bring value to their clients, customers, and colleagues.

As a public speaker since 2012, Diane's presentations contain relevant, direct and proven processes and tangible steps to follow and what it means to be a part of another person's life and to impact their current and future businesses.

Special thanks to our FPA 2021 Sponsors:

Platinum:



Gold:

[ALPS Portfolio Solutions](#)
[Central Indiana Community Foundation](#)
[Franklin Templeton](#)
[Primary Residential Mortgage](#)

Silver:

[Amundi Pioneer Asset Management, Barnes & Thornburg LLP, Charles Schwab Advisor Services, Eagle & Fein, P.C., Johnson Asset Management, MJ Insurance, Mutual of Omaha Mortgage, Palladium Group at Ash Brokerage, Randall Law Offices, Vanguard](#)

Bronze:

Pemberton Insurance Group, Vrabec Insurance, Wright Accounting Group, LLC

FPA of Greater Indiana

P.O. Box 44005
Indianapolis, IN 46244
(317) 373-1355

Email Roxanne, Chapter Executive

FPA Greater Indiana | P.O. Box 44005, Indianapolis, IN 46244

[Unsubscribe roxanne.mcgettigan@fpaindiana.org](mailto:unsubscribe.roxanne.mcgettigan@fpaindiana.org)

[Update Profile](#) | [Constant Contact Data Notice](#)

Sent by roxanne.mcgettigan@fpaindiana.org powered by



Try email marketing for free today!