



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:** Our members, who are all involved in financial planning, stretch from Evansville in southern Indiana to South Bend in northern Indiana. Our chapter represents roughly 350 FPA members and serves over 34,920 Indiana households. The FPA nationally serves more than 24,000 members across more than 90 chapters nationwide.
 - 350 Members
 - 34,920 Households served
 - Over \$15B Economic Base

Why is FPA and financial planning important to Indiana?

- Financial planning promotes financial literacy and stability to Indiana consumers from all walks of life and at every economic level. That's good for our state and for the overall economy.

STRATEGIC ALLIANCES: We feel it is extremely important to build the reputation of Financial Planning as a profession that can be trusted in our community. As professionals, we enjoy working across lines with other local professional groups to plan conferences and joint networking events. These professional groups would include:

- The Indiana CPA Society
- The Estate Planning Council of Indianapolis
- The Indianapolis Bar Association
- CFA Society Indianapolis (Charter Financial Analyst)
- IAIFA (Indiana Association of Insurance and Financial Advisors)

MEETINGS

- **2021 FPA Greater Indiana Meeting Dates:** March 12th, May 7th, September 17th, November 19th
- **Meeting Times:** March 12th will be from 8:30 a.m. – 12:30 p.m.; May 7th and November 19th will be from 8:00 a.m. – 1:30 p.m. and September 17th will be from 8:00 a.m. – 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 5th Floor). In person meetings will be dependent upon the status of Covid and the pandemic.

Please see our website for more chapter information
<https://www.financialplanningassociation.org/chapter/fpa-greater-indiana>

2021 PARTNER BENEFITS

BENEFITS	PLATINUM PARTNER \$5,000 (LIMIT OF THREE NONCOMPETING)	GOLD PARTNER \$2,500 (LIMIT OF SIX NONCOMPETING)	SILVER PARTNER \$1,250	BRONZE PARTNER \$625 (1-3 EMPLOYEES)
RECOGNITION AS THE PRESENTING PARTNER AT ONE QUARTERLY MEETING (\$1,500 VALUE)	X			
SERVE AS AN ADVISOR ON THE FPA BOARD (INVITED TO ATTEND ALL IN-PERSON BOARD MEETINGS)	X			
TEN MINUTE PRESENTATION AT ONE BOARD MEETING	X			
COMPANY FEATURED IN ONE QUARTERLY NEWSLETTER PER YEAR	X			
OPPORTUNITY TO HOST YOUR OWN EVENT FOR FPA MEMBERS AT YOUR COMPANY LOCATION OR OTHER VENUE	X			
PRESENTATION AT ONE QUARTERLY MEETINGS	10 MINUTES	8 MINUTES	3-5 MINUTES	
SCROLLING RECOGNITION WITH LOGO AT EVERY EVENT/MEETING WITH A PROJECTOR PRESENT (INCREASED SIZE FOR PLATINUM)	X	X		
DEDICATED PROMOTIONAL EMAIL TO MEMBER DATABASE (CONTENT TO BE PROVIDED BY PARTNER)	2 PER YEAR	1 PER YEAR		
FEATURED AD IN ONE OF THE QUARTERLY NEWSLETTERS (PROVIDED BY PARTNER)	X	X	X	
FEATURED ARTICLE IN ONE OF THE QUARTERLY NEWSLETTERS (PROVIDED BY PARTNER)	X	X	X	
OPPORTUNITY TO SUBMIT PRESENTATION TO BE CONSIDERED FOR INCLUSION IN A QUARTERLY MEETING	X	X	X	
ABILITY TO POST JOB LISTINGS (ALONG WITH FPA MEMBERS) ON THE WEBSITE FOR TWO MONTHS (\$100.00 PER LISTING)	X	X	X	
COMPANY LOGO, LINK & CONTACT PLACED ON HOMEPAGE	X	X	X	X
FPA TO 'LIKE' AND/OR 'FOLLOW' YOUR COMPANY THROUGH SOCIAL MEDIA TOOLS	X	X	X	X
HOST A VIRTUAL EVENT THROUGH FPA INDIANA (NETWORKING SESSION OR EDUCATIONAL SESSION)	4 EVENTS	3 EVENTS	2 EVENTS	1 EVENT
OPPORTUNITY TO SUBMIT PRESENTATION TO BE CONSIDERED FOR INCLUSION IN SPECIAL 'CE' DAY	X	X	X	X
COMPANY PROFILE AND CONTACT INFORMATION LINKED IN ALL ANNOUNCEMENTS / NEWSLETTERS SENT TO THE MEMBERSHIP (THRU CONSTANT CONTACT)	X	X	X	X

BENEFITS (CONTINUED)	PLATINUM PARTNER \$5,000 (LIMIT OF THREE NONCOMPETING)	GOLD PARTNER \$2,500 (LIMIT OF SIX NONCOMPETING)	SILVER PARTNER \$1,250	BRONZE PARTNER \$625 (1-3 EMPLOYEES)
TWO REPRESENTATIVES ARE INVITED TO ATTEND THE FOUR QUARTERLY MEETINGS (RSVP REQUIRED)	X	X	X	X
OPPORTUNITY TO DISPLAY COMPANY BROCHURES, ETC. AT EACH QUARTERLY MEETING	X	X	X	X
ELECTRONIC SPREADSHEET OF MEMBERSHIP (AVAILABLE UPON REQUEST)	QUARTERLY	BI-YEARLY	ONE-TIME	ONE-TIME
NETWORKING WITH MEMBERS AT THE QUARTERLY MEETINGS, BEFORE, AFTER AND DURING THE 30 MIN. BREAK	X	X	X	X
INVITATION TO ATTEND SPECIAL EVENTS AT MEMBER RATE	X	X	X	X
ATTENDING PARTNERS AT THE QUARTERLY MEETINGS WILL RECEIVE BY EMAIL, A LIST OF THE ATTENDEES	X	X	X	X
OPPORTUNITY TO PARTICIPATE IN A CHAPTER COMMITTEE	X	X	X	X
BENEFIT OF OUR CHAPTER EXECUTIVE WHO WILL WORK WITH YOUR MAIN CONTACT(S) TO ENSURE YOU RECEIVE ALL BENEFITS	X	X	X	X

The Financial Planning Association is the owner of trademark [and registration], service mark and collective membership mark rights in, and various U.S. registrations/applications for: FPA, FPA/Logo and FINANCIAL PLANNING ASSOCIATION. The marks may not be used without written permission from the Financial Planning Association.

**Our Chapter offers two other types of partnerships:
Networking Brunch Partnership at a Quarterly Meeting: \$1,500
and
NexGen Partnership: \$1,000**

For more information on these additional partnership opportunities, please email Roxanne at roxanne.mcgettigan@fpaindiana.org



THE FINANCIAL PLANNING ASSOCIATION OF GREATER INDIANA

PLATINUM PARTNER
GOLD PARTNER, SILVER PARTNER AND
BRONZE PARTNER ENROLLMENT

DATE: _____

Company Name: _____

Contact Name: _____

Phone Number: _____ Cell Number: _____

Full Address: _____

E-mail Address: _____

Web Address: _____

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

- Annual Platinum Partnership Fee: \$5,000
Annual Gold Partnership Fee: \$2,500
Annual Silver Partnership Fee: \$1,250
Annual Bronze Partnership Fee: \$625 (level is for companies with 1-3 employees only)

(when you first join your annual Partnership begins on the date we receive your payment)

Payment:

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

Credit Card Number: _____

Expiration Date: _____ Security Code: _____

Name on Card: _____

Full Billing Address: _____

Phone Number: _____

Mail checks to:

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

**2021/2022 PARTNERS OF THE
FINANCIAL PLANNING ASSOCIATION
OF GREATER INDIANA**

(AS OF 8/03/2021)

PLATINUM PARTNERS

First Trust
Innovative Portfolios

GOLD PARTNERS

ALPS Portfolio Solutions
Central Indiana Community Foundation
Dimensional Fund Advisors
Fidelity
Franklin Templeton
Primary Residential Mortgage

SILVER PARTNERS

Amundi Pioneer Asset Management
Barnes & Thornburg, LLP
Charles Schwab Advisor Services
Eagle & Fein, P.C.
Johnson Asset Management
LPL Financial
MJ Insurance
Mutual of Omaha Mortgage
Palladium Group by Ash Brokerage
Randall Law Offices
Sit Mutual Funds
Vanguard

BRONZE PARTNERS

Pemberton Insurance Group
Vrabec Insurance
Wright Accounting Group, LLC

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