From: **FPA Greater Indiana** roxanne.mcgettigan@fpaindiana.org
Subject: Last Meeting of the Year! Join us on November 19th!
Date: October 7, 2021 at 10:22 AM
To: roxanne.mcgettigan@fpaindiana.org

FPA FINANCIAL PLANNING ASSOCIATION

GREATER INDIANA

November 19, 2021
Quarterly Meeting

Barnes & Thornbug
5th Floor Conference Room

11 S. Meridian Street
5th Floor Conference Room
Indianapolis, IN 46204

This Meeting will be In-Person Only

Registration will close on
Wednesday, November 17th at Noon

FPA Members = Free
Cost: Non-Members = $125.00
Guest of a member is free their first time 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

Meeting Agenda:

8:00 a.m. - 8:20 a.m. Grab a seat and your name-badge
8:20 a.m. - 8:40 a.m. Announcements: Mychal Eagleson, FPA Chapter President

8:40 a.m. - 8:48 a.m. Gold Partner Update: Erik Schulte, Dimensional Fund Advisors
8:48 a.m. - 8:56 a.m. Gold Partner Update: Patrick Hallowell and Mary Holland, Fidelity Institutional

8:56 a.m. - 9:05 a.m. Silver Partner Update: Shane Jefferson, Vanguard

Dan Candura, CFP Candura Group, LLC

9:05 a.m. - 10:45 a.m.
(Approved for 2 hours of CFP Ethics CE and 2 hours of Insurance CE)
"Ethics CE: CFP Board's Revised Code and Standards in 2021"

The new Code of Ethics and Standards of Conduct add greater rigor to the CFP certification requirements, enhancing the value you bring to your clients. By using polls, videos and case studies, Dan keeps everyone involved and learning.

This presentation will:

1) Identify the structure, content and changes of the revised Code and Standards, and grasp the significant changes;

2) Act in accordance with the CFP® Board's Fiduciary Duty;

3) Identify the practice standards when providing financial advice that requires financial planning;

4) Recognize situations when specific information must be provided to a client;

5) Recognize and avoid, or fully disclose and manage Material Conflicts of Interest; and

6) Understand the Duty to report and cooperate

Dan Candura provides financial advice and education to consumers and financial professionals. He is founder of his own education and consulting firm Candura Group, LLC. In that role he provides ethics training across the United States through in-person courses and webinars. As President of PennyTree Advisers, LLC, a Registered Investment Advisory firm in Massachusetts, Dan provides personal financial planning for consumers, financial education counseling to employees in workplace settings and litigation support and forensic financial analysis services for attorneys.

Brunch

10:45 a.m. - 11:20 a.m. Sponsored by:

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11:20 a.m. - 11:30 a.m.: Ryan Thomas, First Trust

Partner Power Networking!

Partner Power Networking!

11:30 a.m. - 11:55 a.m. Our FPA Chapter relies on our partners and the revenue their partnership brings in each year. After the success at our May meeting, we are holding this again, so that our partners can talk to you, especially after our crazy virtual 2020. We are asking that our meeting attendees stay at your table during this allotted time frame. Please put away cell phones, iPads, etc. and listen to our partners while they round-robin and talk for just a few minutes at each table.

Our Chapter couldn't do what it does without the support of our partners!

Cozy Whittman, College Inside Track

11:55 a.m. - 12:45 p.m.
(Approved for 1 hour of CFP CE, 1 hour of Insurance CE is pending)
"FAFSA (Free Application for Federal Student Aid) Changes that WILL Impact Your Clients"

Unbeknownst to most, the COVID relief bill passed at the end of 2020 included some significant changes to the FAFSA. These changes will likely be a huge disruption in the college planning landscape that will require new strategies for your clients. There are distinct winners and losers with the new legislation. These changes sit on top of the massive changes to the college process in the last 2 years, including how colleges award scholarships, ACT testing cancellations and rules for how/when colleges can offer deals to families.

This presentation will educate advisors around the impact the changing landscape will have on their clients and provide opportunities to be able to work with multiple generations.

As Education and Partnership leader at College Inside Track, Cozy Wittman speaks nationally about college search, educating families and training financial advisors and other professionals who work with families with high schoolers. College search has become increasingly complex, the nuances hard to understand; Cozy is passionate about dispelling myths that cost families money! She was featured in The Journal of Financial Planning on the subject of college planning.

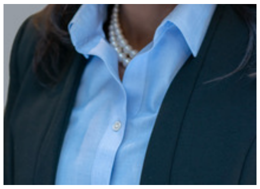
Cozy is excited to connect with organizations and families interested in learning more about the complex college search process. She is a mom of 5 kids with very different goals for college so she is no stranger to the challenges around college search.

Break

12:45 p.m. - 12:50 p.m.

Lisa Anderson, M.S., RPA, Indiana Public Retirement System

12:50 p.m. - 1:40 p.m.
(Approved for 1 hour of CFP CE, 1 hour of Insurance CE is pending)
"Public Employees Retirement Fund & Teachers Retirement Fund Plans and Services"



This presentation gives an overview of Public Employees Retirement Fund (PERF) and Teachers Retirement Fund plans and services, presented by Lisa Anderson with the Indiana Public Retirement System (INPRS).

Attendees will understand the types of retirement plans that INPRS offers to public employees and teachers, how members qualify for benefits and how to use INPRS services for assistance when meeting with clients covered under these plans.

Lisa Anderson is a Senior Manager of Retirement Services at the Indiana Public Retirement System (INPRS) where she leads the Retirement and Financial Education counseling team. While she's been with INPRS for over 11 years, she has more than 25 years of experience in the retirement services industry. She is dedicated to helping individuals engage in and plan their financial futures. Lisa has also worked extensively with employers, consulting on member education, plan design, compliance, and conversions. Lisa holds degrees from the University of Colorado, Regis University of Denver and the Retirement Plans Associate (RPA) designation from the International Foundation of Employee Benefit Plans.

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