



FPA is Your Partner in Planning. The Financial Planning Association® (FPA®) is the leading membership organization for CERTIFIED FINANCIAL PLANNER™ professionals and those engaged in the financial planning process. FPA is your partner in planning by helping you realize your vision of professional fulfillment through practice support, learning, advocacy, and networking.

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- **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)

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#### **MEETINGS**

- **2022 FPA Greater Indiana Meeting Dates:** February 11<sup>th</sup>, May 13<sup>th</sup>, September 30<sup>th</sup>, December 2<sup>nd</sup>
- **Meeting Times:** February 11<sup>th</sup> will be from 8:30 a.m. – 12:30 p.m.; May 13<sup>th</sup> and December 2<sup>nd</sup> will be from 8:00 a.m. – 1:30 p.m. and September 30<sup>th</sup> will be from 8:00 a.m. – 4:00 pm.
- **Meeting Locations:** The February, May and September meetings will be at Barnes & Thornburg (11 S. Meridian Street, Downtown Indianapolis on the 5<sup>th</sup> Floor). The May meeting will be at the Forum Credit Union Conference Center in Fishers.

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

## 2022 PARTNER BENEFITS

<b>BENEFITS</b>	<b>PLATINUM PARTNER \$5,000 (LIMIT OF THREE NONCOMPETING)</b>	<b>GOLD PARTNER \$2,500 (LIMIT OF SIX NONCOMPETING)</b>	<b>SILVER PARTNER \$1,250</b>	<b>BRONZE PARTNER \$625 (1-3 EMPLOYEES)</b>
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	<b>12 MINUTES</b>	<b>10 MINUTES</b>	<b>8 MINUTES</b>	
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)	<b>2 PER YEAR</b>	<b>1 PER YEAR</b>		
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
HOST A VIRTUAL EVENT THROUGH FPA INDIANA (NETWORKING SESSION OR EDUCATIONAL SESSION)	<b>4 EVENTS</b>	<b>3 EVENTS</b>	<b>2 EVENTS</b>	<b>1 EVENT</b>
OPPORTUNITY TO SUBMIT A PRESENTATION TO BE CONSIDERED FOR A CHAPTER MEETING	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

<b>BENEFITS (CONTINUED)</b>	<b>PLATINUM PARTNER \$5,000 (LIMIT OF THREE NONCOMPETING)</b>	<b>GOLD PARTNER \$2,500 (LIMIT OF SIX NONCOMPETING)</b>	<b>SILVER PARTNER \$1,250</b>	<b>BRONZE PARTNER \$625 (1-3 EMPLOYEES)</b>
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](mailto: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**

**2022/2023 PARTNERS OF THE  
FINANCIAL PLANNING ASSOCIATION  
OF GREATER INDIANA**

**(AS OF 4/12/22)**

**PLATINUM PARTNERS**

First Trust  
Innovative Portfolios

**GOLD PARTNERS**

Central Indiana Community Foundation  
Dimensional Fund Advisors  
Fidelity Institutional  
Franklin Templeton  
Primary Residential Mortgage

**SILVER PARTNERS**

Amundi Pioneer Asset Management  
Barnes & Thornburg, LLP  
Charles Schwab Advisor Services  
CNL Securities Corp.  
Eagle & Fein, P.C.  
InSource, Inc.  
Johnson Asset Management  
JPMorgan Asset Management  
LPL Financial  
MJ Insurance  
Mutual of Omaha Mortgage  
Palladium Group by Ash Brokerage  
Prairie Hill Holdings  
Randall & Bryant Law Offices  
Select Sector SPDRs  
Sit Mutual Funds  
SS&C ALPS Advisors  
Vanguard

**BRONZE PARTNERS**

Just Compliance  
Kendall Inventory Service  
Vrabec Insurance  
Wright Accounting Group, LLC

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