

From: FPA Greater Indiana roxanne.mcgettigan@fpaindiana.org
Subject: CHANGE OF VENUE & Don't Forget to Register: September 30th Quarterly Meeting!
Date: September 15, 2022 at 9:22 AM
To: roxanne.mcgettigan@fpaindiana.org



**FINANCIAL
PLANNING
ASSOCIATION**

**GREATER
INDIANA**

**September 30, 2022
Quarterly Meeting**

*** CHANGE OF VENUE ***

FORUM Conference & Event Center

**11313 USA Parkway
Fishers, IN 46037**

**Registration will close on
Wednesday, September 28th 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, a beverage and your name-badge
8:20 a.m. - 8:40 a.m. Announcements: Mychal Eagleson, FPA Chapter President
- 8:40 a.m. - 8:47 a.m.** **Silver** Partner Update: James Bertram, CNL Securities
8:47 a.m. - 8:54 a.m. **Silver** Partner Update: Greg McCormick, InSource
- 8:54 a.m. - 9:02 a.m.** **Silver** Partner Update: Brian Lomedico, Amundi Pioneer

Jeff Levine CPA/PFS, CFP®, CWS®, MSA, Buckingham Wealth Partners



9:10 a.m. - 11:10 a.m.

***** Jeff is giving two presentations back-to-back*****

"How the SECURE Act Changes Retirement (and other) Planning"

(Approved for 1 hour of CFP CE and 1 hour of Insurance CE)

"Estate Planning for the Merely Affluent"

(Approved for 1 hour of CFP CE and 1 hour of Insurance CE)

On December 20, 2019, President Donald Trump signed into law the Setting Every Community Up for Retirement Enhancement (SECURE) Act, ushering in the most significant direct changes to the laws for retirement accounts since the Pension Protection Act of 2006. The 'headline' from the SECURE Act is its changes to the 'stretch' rules for designated beneficiaries, but that's far from the only change that will impact advisors and their clients. The SECURE Act also changes the starting age for RMDs, eliminates the age limit for Traditional IRA contributions, creates a new exception to the 10% early distribution penalty, eliminates burdensome rules that prevented wider-spread adoption of MEPs, reversed changes to the so-called "Kiddie Tax" made by the Tax Cuts and Jobs Act, and much more!

In this session, attendees will learn about each of the major changes made by the SECURE Act, exploring both the new challenges, and planning opportunities, it creates.

Second presentation: In recent years, the rise of the Federal estate tax exemption has dramatically reduced the scope of "traditional" estate planning. Nevertheless, financial advisors can continue to provide an extraordinary amount of value in the overall estate planning process. In this session we'll explore the paradigm shift in end-of-life tax planning, which has changed the focus from estate tax minimization, to basis management and planning to minimize *income* tax liability. We'll also explore how the rise of the digital world has created a new wrinkle for estate planning: how to effectively transition "digital" assets, which may include assets with a monetary value, as well as assets with "just" personal or sentimental value, such as social media profiles and digital photos, and online subscriptions.

Jeff Levine is the Lead Financial Planning Nerd for Kitces.com, a leading online resource for financial planning professionals, and also serves as the Chief Planning Officer for Buckingham Wealth Partners. In 2020, Jeff was named to Investment Advisor Magazine's IA25, as one of the top 25 voices to turn to during uncertain times. Also in 2020, Jeff was

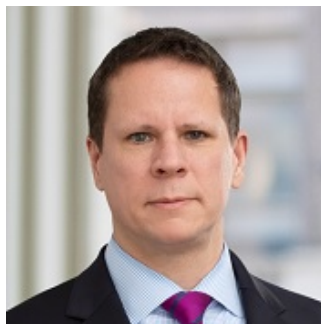
named by Financial Advisor Magazine as a Young Advisor to Watch. Jeff is a recipient of the Standing Ovation award, presented by the AICPA Financial Planning Division for 'exemplary professional achievement in personal financial planning services.'

He was also named to the 2017 class of 40 Under 40 by *InvestmentNews*, which recognizes "accomplishment, contribution to the financial advice industry, leadership and promise for the future." Jeff is the Creator and Program Leader for Savvy IRA Planning®, as well as the Co-Creator and Co-Program Leader for Savvy Tax Planning®, both offered through Horseshoehn, LLC. He is a regular contributor to Forbes.com, as well as numerous industry publications and is commonly sought after by journalists for his insights.

Break

11:10 a.m. - 11:20 a.m.

John Olivieri JD, Barnes & Thornburg LLC



11:20 a.m. - 12:10 p.m.

(Approved for 1 hour of CFP CE, and 1 hour of Insurance CE)

"Estate Planning Techniques for Changing Tax Laws and Volatile Markets"

The Federal gift tax exemption is scheduled to be reduced by 50% on January 1, 2026 and could always be decreased by future legislation. This presentation will explain the so-called "SLAT" technique, which allows a client to make a large gift

and utilize the current exemption before it decreases, but still have access to the gifted funds. For those clients who are uncomfortable making any large gifts, especially in times of volatile markets, this presentation will also explain the GRAT technique, which essentially allows a client to retain his or her current net worth but make gifts of the future appreciation gift-tax free.

John Olivieri is a native born Hoosier who is a partner in the Private Clients group at Barnes & Thornburg LLP. He works from the firm's offices in New York, New York and Indianapolis, Indiana. He is the former Chair of the New York City Bar Association's Committee on Trusts, Estates, and Surrogate's Courts, and has served on the Committee on Estate and Gift Taxation. He is a fellow of the American College of Trust & Estates Counsel ("ACTEC").

**AT THE SAME TIME AS JOHN OLIVIERI IS
SPEAKING, THERE WILL BE A NEXGEN
BREAKOUT FOR UP TO 20 ATTENDEES.
SIGN-UP WILL BE DURING REGISTRATION
THE MORNING OF THE MEETING.**

Thomas Kopelman, AllStreet Wealth



11:20 a.m. - 12:10 p.m.

(Approved for 1 hour of Insurance CE only)

"How to Build Your Brand and Market to Millennials"

The world has changed. We no longer can go to networking events or call everyone we know and build a business. People look for their advisor online and fully vet them through social media, their website, etc. You have very little choice but to build your brand. Thomas will teach attendees how to do this through content marketing.

Thomas Kopelman is the CoFounder of AllStreet Wealth, a financial planning firm for millennial business owners as well as those with equity comp. Thomas is a content creator, podcast host, speaker, and blogger. He is also a top 23 millennial financial planner by Business Insider.

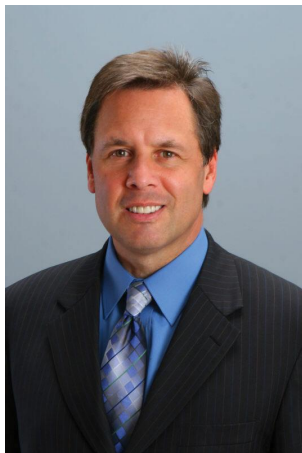
Lunch

12:10 p.m. - 12:45 p.m. Sponsored by:



12:45 p.m. - 12:55 p.m.: Christy Jordan, Innovative Portfolios

Dr. Kevin Elko, Performance Consultant and Motivational Speaker



12:55 p.m. - 1:45 p.m.

"From Crisis to Confidence: How to Swim Your Best Race in Choppy Waters"

This interactive program focuses on obtaining a mindset to move through changing times, panic and finally move to confidence. Dr. Kevin Elko will examine the mental challenges of change and crisis, help attendees become aware of the mental stages of change, and learn how to talk to yourself to mentally handle the change. You will develop a plan for powerful connections during the change period and understand how to position conversations for growth.

Dr. Kevin Elko is being brought to us by our Silver Partner, Amundi Asset Management.

Dr. Kevin Elko is a nationally renowned performance consultant, motivational speaker, author and one of the most popular inspirational presenters in the country today.

In addition to Amundi US, Dr. Elko's corporate clients have included multinational firms in the financial services, industrials and consumer goods sectors, including ING Group, Tyson Foods, Abbot Labs, LPL Financial, The Hartford, Genworth, Jackson National Life, Morgan Stanley, Bank of America, Merrill Lynch and Sun Life.

He is the author of four books, *Nerves of Steel*, *The Pep Talk*, *True Greatness: Mastering the Inner Game of Business Success*, and *Touchdown: Achieving Your Greatness on the Playing Field of Business and Life*.

Dr. Elko received his bachelor's degree in biology education and coaching from California University of Pennsylvania. He then went on to West Virginia University where he earned two masters and a doctorate and was later inducted into West Virginia University Hall of Fame.

Break

1:45 p.m. - 1:50 p.m.

Doug Lennick, CEO think2perform



1:50 p.m. - 2:40 p.m.

(Approved for 1 hour of CFP CE and 1 hour of Insurance CE)

"Behavioral Finance Advice: The Smart Money Philosophy - Preparing for the Certainty of Uncertainty"

Data shows investments work, investors don't. We will review current market conditions, provide insight into why investors buying and selling at the wrong time impact their performance, and how to use the Smart Money Philosophy to structure conversations to prepare for the certainty of uncertainty, especially for those financial professionals that don't know how to introduce planning or don't provide planning as an offering.

Doug Lennick is CEO and co-founder of think2perform. He is legendary for his innovative approaches to developing high performance in individuals and organizations and is an expert at developing practical applications of the art and science of human behavior, financial and otherwise. Doug is an author or co-author of six titles including "Leveraging Your Financial Intelligence: At the Intersection of Money, Health and Happiness" and co-author Moral Intelligence 2.0: Enhancing Business Performance and Leadership Success in Turbulent Times".

Before founding Think2Perform, Doug, a certified financial planner (CFP), was Executive Vice President – Advice and Retail Distribution for American Express Financial Advisors (now Ameriprise Financial). In that capacity he led an organization of 17,000 field and corporate associates to unprecedented success.

Bruce Muller, Indiana SHIP



2:45 p.m. - 3:35 p.m.

(Approved for 1 hour of CFP CE and 1 hour of Insurance CE)

"How to Navigate Medicare"

Attendees will learn the basics of Medicare including the different ways to receive benefits and when to sign up for Medicare. This will include the differences between original Medicare and advantage plans, how supplements work, and financial considerations of the ways to take Medicare.

Bruce Muller is the Volunteer Supervisor at SHIP (State Health

Insurance Assistance Program). Originally from Upstate New York, he moved to Indianapolis in 1979. Prior to his role at SHIP, he worked in the Office of the Indiana Attorney General presenting ways that the consumer can protect themselves from scams and frauds. He lives in Indianapolis with his wife and 2 standard poodles enjoying his large shade garden.

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