



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.

---

- **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**

- **2023 FPA Greater Indiana Quarterly Meeting Dates:** March 10<sup>th</sup>, May 19<sup>th</sup>, September 15<sup>th</sup> and November 3<sup>rd</sup>.
- **Meeting Times:** March 10<sup>th</sup>, September 15<sup>th</sup> and November 3<sup>rd</sup> will be from 8:30 a.m. – 1:30 p.m. May 19<sup>th</sup> will be from 8:30 a.m. – 12:00 p.m. with partner hosted lunch afterwards at neighboring restaurants.
- **Meeting Locations:** The March, 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 FORUM Credit Union Conference & Event Center in Fishers.
- **Additional Meeting:** We hold a half-day meeting in August that has two breakouts – one for continuing education, the other for practice development, after a joint keynote speaker. The date is August 11<sup>th</sup> at MJ Insurance offices.

**Please see our website for more chapter information**

<https://www.financialplanningassociation.org/chapter/fpa-greater-indiana>



## 2023 PARTNER BENEFITS

<b>BENEFITS</b>	<b>PLATINUM PARTNER \$6,000 (LIMIT OF THREE NONCOMPETING)</b>	<b>GOLD PARTNER \$3,000 (UNLIMITED)</b>	<b>SILVER PARTNER \$1,500 (UNLIMITED)</b>	<b>BRONZE PARTNER \$750 (1-3 EMPLOYEES)</b>
RECOGNITION AS THE PRESENTING PARTNER AT ONE QUARTERLY MEETING (\$2,000 VALUE)	<b>X</b>			
GUARANTEE SPEAKER SLOT AT ONE QUARTERLY MEETING PER YEAR (SUBJECT TO CONTENT REVIEW)	<b>X</b>			
OPPORTUNITY TO SUBMIT PRESENTATION TO BE CONSIDERED FOR INCLUSION IN A QUARTERLY MEETING (SELECTION SUBJECT TO CONTENT REVIEW)		<b>X</b>		
OPPORTUNITY TO HOST LUNCH IMMEDIATELY AFTER THE MAY QUARTERLY MEETING	<b>X</b>			
SERVE AS AN ADVISOR ON THE FPA BOARD (INVITED TO ATTEND ALL IN-PERSON BOARD MEETINGS)	<b>X</b>			
COMPANY FEATURED IN ONE QUARTERLY NEWSLETTER PER YEAR	<b>X</b>			
DEDICATED PROMOTIONAL EMAIL FROM FPA CHAPTER TO MEMBER DATABASE (CONTENT TO BE PROVIDED BY PARTNER)	<b>2 PER YEAR</b>	<b>1 PER YEAR</b>		
ABILITY TO BROADCAST EVENTS IN CHAPTER NEWSLETTER	<b>X</b>	<b>X</b>		
ELECTRONIC SPREADSHEET OF MEMBERSHIP (AVAILABLE UPON REQUEST)	<b>QUARTERLY</b>	<b>BI-YEARLY</b>	<b>ONE-TIME</b>	
HIGHLIGHT YOUR COMPANY AT THE BEGINNING OF A QUARTERLY MEETING	<b>X</b>	<b>X</b>	<b>X</b>	
FEATURED AD AND/OR ARTICLE IN ONE OF THE QUARTERLY NEWSLETTERS (PROVIDED BY PARTNER)	<b>X</b>	<b>X</b>	<b>X</b>	
OPPORTUNITY TO PARTICIPATE IN DESIGNATED 'PARTNER POWER NETWORKING' SESSION DURING 1-3 QUARTERLY MEETINGS	<b>X</b>	<b>X</b>	<b>X</b>	<b>X</b>
COMPANY LOGO, LINK & CONTACT PLACED ON HOMEPAGE OF CHAPTER WEBSITE	<b>X</b>	<b>X</b>	<b>X</b>	<b>X</b>
COMPANY LOGO AND/OR NAME LINKED IN ALL ANNOUNCEMENTS / NEWSLETTERS SENT TO THE MEMBERSHIP (THRU CONSTANT CONTACT)	<b>X</b>	<b>X</b>	<b>X</b>	<b>X</b>

<b>BENEFITS (CONTINUED)</b>	<b>PLATINUM PARTNER \$6,000 (LIMIT OF THREE NONCOMPETING)</b>	<b>GOLD PARTNER \$3,000 (UNLIMITED)</b>	<b>SILVER PARTNER \$1,500 (UNLIMITED)</b>	<b>BRONZE PARTNER \$750 (1-3 EMPLOYEES)</b>
ATTENDING PARTNERS AT THE QUARTERLY MEETINGS WILL RECEIVE BY EMAIL, A LIST OF THE ATTENDEES	<b>X</b>	<b>X</b>	<b>X</b>	<b>X</b>
OPPORTUNITY TO DISPLAY COMPANY BROCHURES, ETC. AT EACH QUARTERLY MEETING WITH UP TO 2 REPRESENTATIVES ATTENDING (RSVP REQUIRED)	<b>X</b>	<b>X</b>	<b>X</b>	<b>X</b>
SCROLLING RECOGNITION WITH LOGO AT EVERY EVENT/MEETING WITH A PROJECTOR PRESENT (INCREASED SIZE FOR PLATINUM AND GOLD)	<b>X</b>	<b>X</b>	<b>X</b>	<b>X</b>
NETWORKING WITH MEMBERS AT THE QUARTERLY MEETINGS, BEFORE, AFTER AND DURING THE 30 MIN. LUNCH BREAK	<b>X</b>	<b>X</b>	<b>X</b>	<b>X</b>
BENEFIT OF OUR CHAPTER EXECUTIVE WHO WILL WORK WITH YOUR MAIN CONTACT(S) TO ENSURE YOU RECEIVE ALL BENEFITS	<b>X</b>	<b>X</b>	<b>X</b>	<b>X</b>

*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.*

**For more information on these additional partnership opportunities, please email Roxanne at [roxanne.mcgettigan@fpaindiana.org](mailto:roxanne.mcgettigan@fpaindiana.org)**



**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: \$6,000
- Annual Gold Partnership Fee: \$3,000
- Annual Silver Partnership Fee: \$1,500
- Annual Bronze Partnership Fee: \$750 (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 2.75% 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**

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

**(AS OF 1/12/23)**

**PLATINUM PARTNERS**

First Trust  
Innovative Portfolios

**GOLD PARTNERS**

Central Indiana Community Foundation  
Dimensional Fund Advisors  
Franklin Templeton  
Lincoln Financial RIA Regional Consultant

**SILVER PARTNERS**

Charles Schwab Advisor Services  
CNL Securities Corp.  
Eagle & Fein, P.C.  
iCapital  
InSource, Inc.  
Johnson Asset Management  
JPMorgan Asset Management  
LPL Financial  
Manning & Napier  
Mutual of Omaha Mortgage  
Palladium Group by Ash Brokerage  
Prairie Hill Holdings  
Randall & Bryant Law Offices  
Select Sector SPDRs  
SS&C ALPS Advisors  
Vanguard

**BRONZE PARTNERS**

Fiduciary CFO  
Just Compliance  
Vrabec Insurance

**IN-KIND PARTNERS**

Barnes & Thornburg, LLP  
FORUM Credit Union

**2023 BOARD OF DIRECTORS:**

<p><b>Mychal Eagleson, CFP®, AIF®, ChSNC®</b> An Exceptional Life Financial 317-941-6492 <a href="mailto:MEagleson@AnExceptionalLifeFinancial.com">MEagleson@AnExceptionalLifeFinancial.com</a></p>	President	<p><b>Ryan Thomas, CPA, CFP®</b> Column Capital 317-663-6508 <a href="mailto:ryant@columncapital.com">ryant@columncapital.com</a></p>	Chairman
<p><b>Adam Cmejla, CFP®</b> Integrated Planning &amp; Wealth Management 317-706-4748 <a href="mailto:adam@integratedpwm.com">adam@integratedpwm.com</a></p>	President-Elect	<p><b>Elizabeth Braden, CFP®</b> 765-631-2163 <a href="mailto:elizabeth.m.braden@gmail.com">elizabeth.m.braden@gmail.com</a></p>	Treasurer
<p><b>Shaun Irwin, CFP®</b> Forum Private Client Group 317-752-1751 <a href="mailto:shaun.irwin@forumpcg.com">shaun.irwin@forumpcg.com</a></p>	Secretary	<p><b>Matt Sigler, CFP®</b> Busey Wealth Management 317-705-9117 <a href="mailto:Matt.sigler@busey.com">Matt.sigler@busey.com</a></p>	Director of Membership
<p><b>Benjamen Banks, CFP®</b> FORUM Private Client Group 317-558-6065 <a href="mailto:Benji.banks@forumpcg.com">Benji.banks@forumpcg.com</a></p>	Director of Partnerships	<p><b>Austin Angel, CFP®</b> Market Street Wealth Mgmt. Advisors 317-672-1949 <a href="mailto:austina@mswma.com">austina@mswma.com</a></p>	Co-Director of NexGen
<p><b>Ed Wildermuth, CFP®, ChFC®, CPA</b> Innovative Financial Solutions 317-324-8018 <a href="mailto:ed@ioms.com">ed@ioms.com</a></p>	Co-Director of NexGen	<p><b>David Klaus, CFP®, MBA, CASL®, RICP®</b> One to One Financial Advisors 317-819-7350 <a href="mailto:david_klaus2021@yahoo.com">david_klaus2021@yahoo.com</a></p>	Co-Director of Programming
<p><b>Jeff Hess</b> Palladium Group by Ash Brokerage 317-775-6339 <a href="mailto:jeff.hess@thepalladiumgrp.com">jeff.hess@thepalladiumgrp.com</a></p>	Co-Director of Programming	<p><b>Chad Reed, CPA, CFP®</b> Valeo Financial Advisors, LLC 317-218-6007 <a href="mailto:cdreed@valeofinancial.com">cdreed@valeofinancial.com</a></p>	Co-Director of Pro Bono
<p><b>Jesse Vasquez</b> Vasquez Financial Consulting, LLC 317-281-7616 <a href="mailto:jesse@vasquezfc.com">jesse@vasquezfc.com</a></p>	Co-Director of Pro Bono	<p><b>Brian Wright, CFP®, MBA</b> Wright Planning 317-537-1987 <a href="mailto:brian@wrightplanning.com">brian@wrightplanning.com</a></p>	Director of Past President's Club
<p><b>Joe Gianoli, CFP®</b> Key Private Bank 317-340-0457 <a href="mailto:joe@giano.li">joe@giano.li</a></p>	At Large Member	<p><b>Bradley Yu, CFP®, CPA</b> Column Capital Advisors 317-663-6120 <a href="mailto:bradleyyu@columncapital.com">bradleyyu@columncapital.com</a></p>	At Large Member
<p><b>Cassi Vanderpool</b> Bedel Financial Consulting, Inc. 317-843-1358 x222 <a href="mailto:cvanderpool@bedelfinancial.com">cvanderpool@bedelfinancial.com</a></p>	At Large Member	<p><b>David Ritchey</b> Symetra 317-775-2272 <a href="mailto:davidmritchey@gmail.com">davidmritchey@gmail.com</a></p>	At Large Member
		<p><b>Roxanne McGettigan</b> FPA of Greater Indiana 317-373-1355 <a href="mailto:roxanne.mcgettigan@fpaindiana.org">roxanne.mcgettigan@fpaindiana.org</a></p>	Chapter Executive