



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)
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MEETINGS

- **2024 FPA Greater Indiana Quarterly Meeting Dates:** March 15th, May 10th, September 13th and November 15th.
- **Meeting Times:** March 15th, September 13th and November 15th will be from approximately 8:30 a.m. – 1:30 p.m. May 10th will be from 8:30 a.m. – 12:00 p.m.
- **Meeting Locations:** The March, May and September meetings will be at Barnes & Thornburg (11 S. Meridian Street, Downtown Indianapolis on the 5th 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 TBD.

Please see our website for more chapter information

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



2024 PARTNER BENEFITS

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

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

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



FINANCIAL
PLANNING
ASSOCIATION

GREATER
INDIANA

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: \$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

**2023/2024 PARTNERS OF THE
FINANCIAL PLANNING ASSOCIATION
OF GREATER INDIANA**

(AS OF 2/01/2024)

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First Trust
Innovative Portfolios

GOLD PARTNERS

Capital Group | American Funds
Central Indiana Community Foundation
Dimensional Fund Advisors
Lincoln Financial RIA Regional Consultant
Oak Street Funding
Palladium Group by Ash Brokerage

SILVER PARTNERS

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BUI
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InSource, Inc.
JPMorgan Asset Management
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Natixis Investment Managers
Prairie Hill Holdings
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Fiduciary CFO
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Barnes & Thornburg, LLP
FORUM Credit Union

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