From: **Greater Indiana FPA** roxanne@fpagreaterindiana.ccsend.com
Subject: May is right around the corner! Register for our next quarterly meeting!
Date: March 28, 2024 at 10:56 AM
To: roxanne.mcgettigan@fpaindiana.org

GF

FPA FINANCIAL PLANNING ASSOCIATION

GREATER INDIANA

May 10, 2024
Quarterly Meeting

FORUM Event & Conference Center

11313 USA Parkway
Fishers, IN 46037

Registration will close on Wednesday, May 8th at Noon

FPA Members = Free
Cost: Non-Members = $200
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

Constant Contact continues to change its platform. If you would like to bring a guest, you will need to register him/her separately. Please put: (Guest) after their first name.

Meeting Agenda:

8:00 a.m. - 8:20 a.m. Grab a seat, your name-badge and a quick bite to eat
8:20 a.m. - 8:40 a.m. Announcements: Adam Cmejla, FPA Chapter President
8:40 a.m. - 8:48 a.m. **SILVER** Partner Update: Nick Carpas, JP Morgan
8:48 a.m. - 8:56 a.m. **SILVER** Partner Update: Jeff Lowrie, Sandhill Investment Management
8:56 a.m. - 9:05 a.m. **SILVER** Partner Update: Kim Walker, FORUM Credit Union
9:05 a.m. - 9:10 a.m. **SLIDO**

Greg Geisler, PhD, Kelley School of Business

9:10 a.m. - 10:00 a.m.
(Accepted for 1 hour of CFP CE, and 1 hour of Insurance CE)
"Student Loans Impact on an Individual's Financial Future"

This presentation will show how much less wealthy an individual is if they follow Dave Ramsey's steps—pay off all debts other than home mortgage before investing for retirement—instead of the Tax-Efficient Accumulation steps as outlined by Greg Geisler.

Further this presentation uses a specific illustration that shows for each additional $50,000 of student loans there is a reduction in total investments at retirement between about $600,000 and $1,100,000. This occurs while holding income and spending—other than on student loans—the same over 40 years of working and both student loan debt and investing being at the same rate (i.e., 6%).

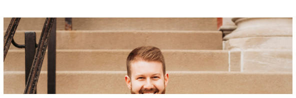
Greg Geisler is Clinical Professor at Indiana University with a demonstrated ability to discover new knowledge at the intersection of taxes and financial planning in areas such as Tax-efficient charitable giving, Avoiding or Reducing Additional Medicare Premiums, Health Savings Accounts, Retirement accounts, Social Security benefits taxation, Tax-efficient investing and Paying down debts, and Tax-efficient decumulation after retirement. Greg has published almost 20 articles on taxes and financial planning in the last 12 years, including two that received the 2017 and 2022 "Montgomery-Warschauer Awards" for most outstanding article contributing to the betterment of the financial planning profession.

NEXGEN BREAKOUT

AS GREG GEISLER PRESENTS IN THE MAIN ROOM, WE WILL BE HOLDING A NEXGEN BREAKOUT SESSION AT THE SAME TIME FOR APPROXIMATELY 24 MEMBERS.

There will be a sign-up sheet for the NexGen breakout session at the registration table on the morning of the meeting.

Drew Feutz, CFP®, Migration Wealth Management



9:10 a.m. - 10:00 a.m.
(CE is not being offered for this breakout session)

"Launching your Own RIA"

Drew is going to discuss the decision to leave his RIA after seven years, the steps he took to start his business and how he set himself up for success. He will explain how he decided what services to offer, how to charge for those services and the types of clients he works with. He will end the presentation with the lessons he learned along the way and how his business has evolved over time.

Bring your questions so this can be an open conversation!

In February, 2022 Drew founded Migration Wealth Management, after working at Market Street Wealth Management Advisors for seven years as a financial advisor.

He graduated from Indiana State University and currently lives in Indianapolis with his wife, Amanda and golden retriever puppy Gus. He loves to travel, workout at the gym and trying new craft beers. He proudly admits that he is a stereotypical Millennial!

Best Practices Forum

10:05 a.m. - 10:35 a.m.

This facilitated group session will serve as a time for collaboration among our FPA chapter members as we focus on sharing best practices in several different areas. Whether broker-dealer affiliated or RIA, commission or fee-only, all of us face similar challenges unique to our industry, and having other professionals to discuss solutions with, can sometimes make all the difference.

We will have several prepared discussion points/questions as we cover topics including, but not limited to, financial planning methods, business development, technology, and compliance.

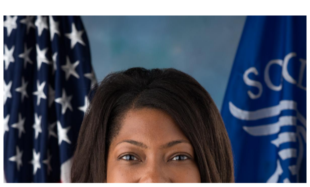
When we begin you will stay at your initial table and a discussion point/question will be asked by the Moderator. At this time, you will discuss among your table-mates for 4-5 minutes, the Moderator will then choose several tables to share their best thoughts on this topic for another 4-5 minutes and then on to the next prepared discussion point/question.

We are excited to hear your thoughts, whether you are our most experienced members, past board members, students or NexGen members - it will be a session full of valuable information you won't want to miss.

Break

10:35 a.m. - 10:40 a.m.

Charo Boyd, M.S., Social Security Administration Public Affairs Specialist



10:40 a.m. - 12:30 p.m.
(Accepted for 2 hours of CFP CE, 2 hours of Insurance CE is pending)
"Social Security Retirement, Spouse and Survivors Benefits Update 2024 with Case Studies"

Charo Boyd, SSA's Public Affairs Specialist, will conduct an

Charo Boyd, SSA's Public Affairs Specialist, will conduct an interactive seminar explaining retirement benefits and demonstrating numerous services available at ssa.gov. She will cover how age and wages affects benefits and explain entitlement factors for Social Security retirement, spouse, ex-spouse, and survivor benefits. Questions and case scenarios will be taken throughout the presentation.   A special emphasis will be given to online services available via “mysocialsecurity” and SSA's redesigned website. Enhance your experience, create an account at **www.ssa.gov/myaccount** and have your Social Security statement (if not receiving benefits) with you during the webinar! It is easier to help your clients create an account when you have done it for yourself!

Charo Boyd is responsible for informing the public about SSA programs and benefits. She has been employed with the SSA since 2002. She began her career as a claims representative in the Downtown Indianapolis SSA office. She has worked as an Insurance Specialist in all areas of the Title II Program (Medicare, Retirement, Survivors, and Disability Insurance Benefits).

Boyd has a B.S. in Psychology (Magna Cum Laude) and a M.S. in Guidance & Counseling with a concentration in clinical and organizational counseling all from Tennessee State University.

Boyd received SSA's Regional Communicator Award in 2010 and 2018. She also received Deputy Commissioner's Citations in 2010, 2015, and 2018 from SSA's Office of Communications.

Special thanks to our FPA 2024 Partners:

Platinum:

First Trust   INNOVATIVE portfolios

Gold:

Capital Group | American Funds
Central Indiana Community Foundation
Dimensional Fund Advisors
Oak Street Funding
Palladium Group at Ash Brokerage

Silver:

Allianz, **BUI**, **Charles Schwab Advisor Services**, **Eagle & Fein, P.C.**, **iCapital**, **JP Morgan Asset Management**, **Manning & Napier**, **Natixis Investment Managers**, **New York Life Investments**, **Prairie Hill Holdings**, **Sandhill Investment Management**, **Vanguard**

Bronze:
Fiduciary CFO, Just Compliance, Vrabec Insurance

In Kind:
Barnes & Thornburg LLP, FORUM Credit Union

FPA of Greater Indiana
P.O. Box 44005
Indianapolis, IN 46244
(317) 373-1355

Email Roxanne, Chapter Executive