From: **Greater Indiana FPA** roxanne@fpagreaterindiana.ccsend.com
Subject: Join us for our meeting in May!
Date: April 1, 2025 at 10:45 AM
To: roxanne.mcgettigan@fpaindiana.org

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FPA FINANCIAL PLANNING ASSOCIATION

GREATER INDIANA

May 9, 2025
Quarterly Meeting

FORUM Conference & Event Center

11313 USA Parkway
Fishers, IN 46037

Registration will close on
Wednesday, May 7th 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.

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If you would like to bring a guest, you will need to do a second registration and register him/her separately. You can no longer add a guest when making your registration.

Please write (Guest) after their first or last name.

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RESERVE MY SPOT!

Meeting Agenda:

8:00 a.m. - 8:35 a.m. Grab a seat, your name-badge and enjoy a continental breakfast
8:25 a.m. - 8:40 a.m. Announcements: Adam Cmejla, FPA Chapter President
8:40 a.m. - 8:48 a.m. **SILVER** Partner Update: Sam Tippy, Allianz
8:48 a.m. - 8:56 a.m. **SILVER** Partner Update: Natalie Beane, Provide
8:56 a.m. - 9:05 a.m. **IN-KIND** Partner Update: Susan Toner, FORUM Private Client Group

Valerie Brennan, CPA, PFS and David Burnett, CPA, CFP, CEPA, CBIZ Somerset

9:05 a.m. - 9:55 a.m.
(Accepted for 1 hour of CFP CE, 1 hour of Insurance CE is pending).
"Federal Tax Update: Key Changes & Planning Strategies for 2025"

Stay ahead of the latest federal tax developments with this comprehensive update tailored for financial planners. This session will cover recent and potential federal tax legislation, key tax law updates for individuals and businesses, and essential planning strategies. Gain insights into new retirement provisions, investment taxation and estate planning considerations. Equip yourself with actionable strategies to help clients navigate the evolving tax landscape.

Valerie is a Managing Director with a focus on Tax and Financial Planning. She specializes in wealth management as well as tax compliance and consulting services. She works with high-net-worth individuals and entrepreneurs, furnishing tax and accounting expertise, and developing financial planning strategies. Valerie joined CBIZ in February 2023 through its acquisition of Somerset CPAs and Advisors. Prior to that, she was a principal at Somerset since 2001, following Somerset's acquisition of her firm, Cox, Brennan & Co., LLP. Before founding Cox, Brennan & Co., LLP in 1997, she built her own practice and gained experience working with a Big Four accounting firm and in private industry.

Throughout her career, Valerie has focused on supporting entrepreneurial businesses and their owners across a variety of industries. In addition to her expertise in tax and accounting, she specializes in developing personalized financial planning strategies to help her clients achieve their goals. Valerie is a Personal Financial Specialist and holds Series 7 and 66 securities licenses.

Dave provides proactive direction on complex tax, business and estate planning initiatives for clients. He is focused on tax compliance and consulting for flow through entities and their owners. Dave has extensive expertise in entity and transaction structure, mergers and acquisitions, joint ventures, reorganizations and succession planning for closely held businesses.

Dave provides wealthy individuals, many of whom are business owners, and their families with sound guidance in the areas of income tax compliance, tax planning, estate and gifting strategies, wealth transfer and private equity. His background allows Dave to effectively communicate with various members of the client's advisory team to provide comprehensive and practical solutions.

Break

9:55 a.m. - 10:05 a.m.

J. Scott Christianson, Associate Teaching Professor and Director of Center for Entrepreneurship and Innovation, University of Missouri

10:05 a.m. - 10:50 a.m.

Join us for an interactive, hands-on "Blockchain Game" prior to Scott's presentation, that demystifies the technology behind cryptocurrencies and digital ledgers. Through fun simulation, participants, will explore the fundamental principles of blockchain (how hashes work, how blocks are added to the chain, how consensus is reached, etc.) and discover why - and when - this technology truly matters.

J. Scott Christianson

10:50 a.m. - 11:40 a.m.
(Accepted for 1 hour of CFP CE , 1 hour of Insurance CE is pending)
"Navigating the New Frontier of Money: Cryptocurrencies, NFTs and Beyond"

As digital assets continue to reshape the financial landscape, financial planners must be prepared to guide their clients through the complexities, opportunities, and risks in this emerging space. This session will provide a clear overview of cryptocurrencies, non-fungible tokens (NFTs), and central bank digital currencies (CBDCs), highlighting the impact of owning these asset classes. Attendees will learn to identify some key risk factors, integrate these assets thoughtfully into client portfolios, and remain vigilant about regulatory and technical risks.

J. Scott Christianson is an Associate Teaching Professor of management at the University of Missouri, where his interests are focused on the impact of emerging technology on society and geopolitics. Prior to joining the college, he was an entrepreneur with decades of experience in videoconferencing technology, project management and information technology. He currently serves as the College's Director of the Center for Entrepreneurship and Innovation, helping students turn their ideas into profitable products and services.

Break

11:40 a.m. - 11:45 a.m.

Rebecca Vaughn

11:45 a.m. - 12:35 p.m.
(Accepted for 1 hour of CFP CE , 1 hour of Insurance CE is pending)
"Overview of Long Term Care"

With the maturation of the baby boomer generation, the need for long term care services and supports is very relative and increasingly expensive. By 2030, over 20% of the U.S. population will be 65 years or older.

This presentation defines LTC services, explains how LTC differs from medical care, and explores the challenges encountered by individuals and families in obtaining care and financing those services. An overview of the current LTC insurance market and future trends will be presented.

Rebecca Vaughan joined the Indiana Dept. of Insurance in January 2007 as Director of the Indiana Long Term Care Partnership Program. She is the Department's Long Term Care subject matter expert and provides expertise on legislative matters. She participates on several national NAIC insurance committees.

Prior to joining the Department of Insurance, Rebecca was an independent agent for several years owning her own agency specializing in the employee benefits market. Her experience also includes work in the self-funded market and TPA services.

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