



## FINANCIAL PLANNING ASSOCIATION

GREATER  
INDIANA

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.

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- **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 300 FPA members. The FPA nationally serves 22,000 members across 78 chapters nationwide.

### 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
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### MEETINGS

- **2026 FPA Greater Indiana Quarterly Meeting Dates:** March 13<sup>th</sup>, May 6<sup>th</sup>, and November 4<sup>th</sup>.
- **Meeting Times:** The meetings will be from 8:00 a.m. – 1:00 p.m.
- **Meeting Locations:** Capital Group | American Funds Event Center: 12711 N. Meridian Street, Carmel, IN 46032
- **Additional Meeting:** FPA Crossroads: Where Expertise Meets Experience; August 11 – 13<sup>th</sup>; French Lick Indiana (partnerships will be sold separately for this 3-day event).
- **Meetings/Events may be added to the schedule.**

Please see our website for more chapter information

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



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## 2026 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>		
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 1-2 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	<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>

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**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**

**2026/2027 PARTNERS OF THE  
FINANCIAL PLANNING ASSOCIATION  
OF GREATER INDIANA**

**(AS OF 12/10/2025)**

**PLATINUM PARTNERS**

Allworth Financial  
Lincoln Financial

**GOLD PARTNERS**

Capital Group | American Funds  
Central Indiana Community Foundation  
Dimensional Fund Advisors  
First Trust Portfolios  
Meketa Capital  
Oak Street Funding  
Palladium Group by Ash Brokerage  
SS&C ALPS Advisors

**SILVER PARTNERS**

Allianz  
Barnabas Capital  
Eagle & Fein, P.C.  
Hageman Group  
iCapital  
MarketShare Financial  
Merchants Bank  
Natixis Investment Managers  
Prairie Hill Holdings  
Provide  
Vanguard  
YMCA of Greater Indianapolis

**BRONZE PARTNERS**

Core Insurance Solutions  
ES2 Insurance  
Fiduciary CFO  
Iconic Insurance, LLC  
Indiana Business Advisors

## 2026 BOARD OF DIRECTORS:

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