From: **Greater Indiana FPA** roxanne@fpagreaterindiana.ccsend.com
Subject: Save your Seat for our November Quarterly Meeting (last meeting of 2025)!
Date: October 7, 2025 at 11:22 AM
To: roxanne.mcgettigan@fpaindiana.org

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FPA FINANCIAL PLANNING ASSOCIATION

GREATER INDIANA

LAST MEETING OF THE YEAR!

November 14, 2025
Quarterly Meeting

Barnes & Thornburg

11 S. Meridian Street
Indianapolis, IN 46204

5th Floor Conference Center

Registration will close on Wednesday, November 12th 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 hearty breakfast!**
8:35 a.m. - 8:50 a.m. Announcements: Austin Angel, FPA Chapter President-Elect
8:50 a.m. - 8:58 a.m. **Silver** Partner Update: Ariana Meiser, Merchants Bank
8:58 a.m. - 9:06 a.m. **Silver** Partner Update: Corey Hock, Natixis Investment Managers
9:06 a.m. - 9:14 a.m. **Gold** Partner Update: Jeff Hess, Palladium Group by Ash Brokerage

Dan Candura, Candura Group, LLC

9:15 a.m. - 11:15 a.m.
(Accepted for 2 hour of CFP Ethics CE, and 2 hours of Insurance CE)
"Ethics CE: A Practical Application of CFP Board's Code & Standards for 2025"

Dan Candura was last here in 2021, so we are thrilled to have him back in Indianapolis!

The Code of Ethics and Standards of Conduct add greater rigor to the CFP certification requirements, enhancing the value you bring to your clients. By using polls, videos and case studies, Dan keeps everyone involved and learning.

This presentation will:

1) Recognize when a CFP® Professional is providing financial advice;

2) Act in accordance with the CFP® Board's Fiduciary Duty;

3) Describe when financial advice requires financial planning and the additional obligations that apply;

4) Determine what information must be provided to the client and when to document the exchange of information.

5) Identify duties when using or referring other service providers or technologies; and

6) Describe the process CFP Board follows to uphold the Code and Standards

Dan Candura, CFP BOARD EMERITUS™ is the founder of Candura Group, LLC and provides ethics training across the United States, Canada, Europe and Australia through in-person courses and webinars. As President of PennyTree Advisers LLC, until September 2019, Dan provided financial planning for consumers and litigation support for attorneys. Dan taught financial planning, insurance planning and retirement planning in the Sawyer School of Business at Suffolk University in Boston and was CFP® Ambassador for the Boston area of Business at Suffolk University in Boston and was CFP® Ambassador for the Boston area. He now lives in Braintree Massachusetts.

Break

11:15 a.m. - 11:20 a.m.

Greg Geisler, PhD, Kelley School of Business, Indiana University

11:20 a.m. - 12:10 p.m.
(Accepted for 1 hour of CFP CE, and 1 hour of Insurance CE)
"One Big Beautiful Bill Act (OBBBA): What's Most Important for 2025 Financial Planning"

This presentation is on Tax Law Changes (in the One Big Beautiful Bill Act) that are most relevant for Financial Planning in 2025.

The focus will be on significant changes that a financial planner could have potential involvement with for some of their clients.

Specifically, the new Senior Deduction and its Phase-out if Income is too high, the increase in the State and Local Taxes category of Itemized Deductions from $10,000 maximum to $40,000 maximum and its Phase-Down if Income exceeds $500,000, and finally Professional Service providing business owners (that are not a C corporation) can have their entire 20% Qualified Business Income Deduction phased out but there are many ways to tax plan around this potentially significant phase out.

To summarize what the presentation topics have in common is recent tax law changes that are the most relevant for financial planning and how proper planning can reduce the present value of federal income taxes paid overtime by clients.

Greg Geisler is a Clinical Professor at Indiana University – Bloomington who both teaches and researches at the intersection of income tax and financial planning including on Tax-efficient charitable giving, Avoiding or Reducing Additional Medicare Premiums, Health Savings Accounts, Tax-efficient investing, and Tax-efficient decumulation after retirement. Greg has published almost 20 articles on income tax and financial planning in the last 13 years, including two that received the 2017 and 2022 "Montgomery-Warschauer Awards" from the Journal of Financial Planning for outstanding contribution to the betterment of the financial planning profession. This is his 8th consecutive year of presenting to Greater Indiana financial planners.

Best Practices Forum

12:10 p.m. - 12:40 p.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 directly related to the One Big Beautiful Bill Act (OBBBA). More specifically, this is an opportunity for you all to collaborate on how specific items within this bill impact financial planning opportunities for your clients.

Special thanks to our FPA 2025 Partners:

Platinum:

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Gold:

Capital Group | American Funds
Central Indiana Community Foundation
Dimensional Fund Advisors
First Trust
Meketa Capital
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Silver:
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:
Fiduciary CFO, Iconic Insurance LLC, Indiana Business Advisors, Vrabec Insurance

In Kind:
Barnes & Thornburg LLP, FORUM Credit Union

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