From: **Greater Indiana FPA** roxanne@fpagreaterindiana.ccsend.com
Subject: Save your Seat for our September Quarterly Meeting!
Date: August 7, 2025 at 9:38 AM
To: roxanne.mcgettigan@fpaindiana.org

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FPA FINANCIAL PLANNING ASSOCIATION

GREATER INDIANA

September 12, 2025
Quarterly Meeting

Barnes & Thornburg

11 S. Meridian Street
Indianapolis, IN 46204

5th Floor Conference Center

Registration will close on
Wednesday, September 10th 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: Adam Cmejla, FPA Chapter President
8:50 a.m. - 8:58 a.m. Silver Partner Update: David Shoup, MarketShare Financial
8:58 a.m. - 9:06 a.m. Silver Partner Update: Alex Dicke, Hageman Group
9:06 a.m. - 9:14 a.m. Platinum Partner Update: Scott Gawrych, Allworth Financial

Leah Hadley, AFC®, CDFA®, MAFF®; Founder of Intentional Wealth Partners and Intensional Divorce Solutions

9:15 a.m. - 10:05 a.m.
(Accepted for 1 hour of CFP CE, 1 hour of Insurance CE is pending)
"Trust in the Tension: How to Build Client Confidence Amidst Conflict and Broken Relationships

Clients going through divorce, betrayal, or family conflict often arrive in a financial planner's office emotionally raw, overwhelmed, and unsure of who or what to trust. In these moments, planners can either unknowingly retraumatize or become a vital anchor.

This session explores how to recognize emotional cues of broken trust, how to communicate with compassion and clarity, and how to implement planning structures that empower even the most vulnerable clients. Attendees will leave with practical communication tools and strategies to build client confidence during times of emotional upheaval.

Leah Hadley is the founder of Intentional Wealth Partners and Intentional Divorce Solutions. She is also the host of the Intentional Divorce Insights podcast. Leah specializes in guiding clients through emotionally charged life transitions, including divorce, loss, and conflict. As an Accredited Financial Counselor®, Certified Divorce Financial Analyst®, and Master Analyst in Financial Forensics, Leah brings deep technical expertise alongside a trauma-informed, human-centered approach. She is a passionate advocate for integrating emotional intelligence into the financial planning profession and regularly speaks on topics such as behavioral finance, financial abuse, and client empowerment.

Partner Power Networking

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

Our FPA Chapter relies on our partners and the revenue their partnership brings in each year. We are asking that our meeting attendees stay at your table during this allotted time frame. Please put away cell phones, iPads, etc. and listen to our partners while they round-robin and talk for just a few minutes at each table.

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Our Chapter couldn't do what it does without the support of our partners!

Break

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

Christian McCormick, CFA; Meketa Financial

10:40 a.m. - 11:30 a.m.
(Accepted for 1 hour of CFP CE , 1 hour of Insurance CE is pending)
"What are Private Equity Co-Investments and What Should Advisors Know?"

Advisors are being inundated with new private equity investment options, especially in the form of tender and interval funds. This presentation will work through what these investment structures actually own/invest in, with a particular focus on co-investments. Attendees will also be given insight into what the private market landscape looks like going forward.

Christian joined Meketa Investment Group in 2025 as a Senior Vice President/Head of Client Portfolio Management. He has been in the financial services industry for more than 25 years primarily focused on private equity and quantitative public equity. As a senior vice president of the firm, he serves as the Head of Client Portfolio Management focusing primarily on private markets and investment strategy and education for Meketa Capital clients. He is a member of the firm's Global Macroeconomic, Asset Allocation, and Co-Investments Committees.

Prior to joining the firm, Christian was a senior consultant with the investment consulting firm, NEPC. He also spent two decades with various asset management firms in lead and senior client portfolio manager and product specialist roles.

Christian enjoys exploring new cultures and countries with his family and friends. He took up drumming late in life to play alongside his son and participates in obstacle course races.

Break

11:30 a.m. - 11:35 a.m.

Jennifer Turner and Carlk Collier, CAP; Central Indiana Community Foundation

11:35 a.m. - 12:25 p.m.
(Accepted for 1 hour of CFP CE, accepted for 1 hour of Insurance CE)
"Designing Generosity: Case Studies in Strategic Giving"

This presentation explores practical and strategic approaches to philanthropy for high-net-worth clients. Through real-world scenarios, the session highlights how charitable vehicles such as donor-advised funds (DAFs), supporting organizations, and nonprofit endowments can be used to meet evolving family dynamics, maximize tax efficiency, and honor legacy giving goals.

Additional topics include alternatives to private foundations, Qualified Charitable Distributions, and the gifting of appreciated assets and closely held business interests. Attendees will gain insight into thoughtful planning and how to guide clients toward sustainable, meaningful charitable impact.

Jennifer Turner is the vice president of philanthropy and oversees the new business, donor engagement, scholarship, and family philanthropy teams for CICF. She also works with their affiliate's leadership and development teams to coordinate effective fundraising campaigns to maximize resources and gifts across the collaborative. Jennifer brings 20 years of development experience.

Clark serves as CICF's lead charitable gift planner and senior new business development officer, working with families, businesses, not-for-profits and their advisors to create comprehensive and impactful philanthropic plans. In leading CICF's development team, Clark provides fundraising strategy and support for CICF and its affiliates, as well as expertise regarding planned giving, campaigns, and not-for-profit sustainability for charitable organizations that hold funds with CICF.

Special thanks to our FPA 2025 Partners:

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