From: **Greater Indiana FPA** roxanne@fpagreaterindiana.ccsend.com
Subject: Join us for our half-day meeting in August!
Date: July 17, 2025 at 3:03 PM
To: roxanne.mcgettigan@fpaindiana.org

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FINANCIAL PLANNING ASSOCIATION

GREATER INDIANA

August 22, 2025
8:30 a.m. - 11:50 a.m.

MJ Insurance Offices

571 Monon Blvd.
Carmel, IN 46032

3rd Floor Conference Room
MAX CAPACITY IS 60 people

Registration will close on Wednesday, August 20th 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:

8:30 a.m. - 8:45 a.m. Grab a seat and your name badge. We will have a light continental breakfast.
8:45 a.m. - 8:50 a.m. Welcome from Julie Bingham, MJ Insurance
8:50 a.m. - 9:00 a.m. Announcements: Adam Cmjela, President

PANEL DISCUSSION
with Chris Kerckhoff, CFP® of Plancorp and Adam Farag of Oak Street Funding

9:00 a.m. - 9:50 a.m.
"Planning for Succession and/or M&A"

Chris Kerckhoff and Adam Farag will discuss changes of ownership within the wealth management industry, whether it is internal or external. They will explain value multiples, deal structures, financing and how to prepare your firm for succession and/or M&A. Topics will also include integration, client care post closing; along with addressing single owner books of business and becoming a future seller. This presentation will be interactive with Q&A throughout.

As CEO of Plancorp Wealth Management, a $7B AUM firm based in St. Louis, Chris brings a dynamic blend of strategic vision and deep respect for the client relationship to the forefront of the RIA industry. With a career rooted in driving sustainable growth, Chris is especially passionate about helping firms scale—organically and through acquisition—by investing in what matters most: people, client experience, and integrated technology. Under his leadership, Plancorp has successfully transitioned to a second-generation leadership team while maintaining a focus on organic growth by enhancing the client journey, empowering advisors, and leveraging scalable, integrated technologies.

Adam brings to Oak Street Funding 15 years of experience in banking, specializing in business lending. He has successfully advised hundreds of business owners, helping them expand and thrive. Previously, Adam was Vice President of Lending at Renovo Financial, where he was instrumental in the company's rapid growth, being one of the original 15 employees making it the 2nd fastest growing company in Chicago in 2016. In the last seven years, he has secured over 200 million in capital for wealth advisors for acquisitions, succession planning, and debt restructuring. Adam lives in Indianapolis, Indiana, with his wife Kristen, and their two children.

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Break

9:50 a.m. - 10:00 a.m.

Daleele Alison, CEO RooksDM

10:00 a.m. - 10:50 a.m.

"Reclaim Your Day: Microsoft AI and Automation Solutions to Streamline Your Firm"

Every hour you or your team spends on manual or inefficient processes is an hour not spent with clients, building relationships, or driving growth. Over time, that adds up and limits your capacity to move the business forward.

In this session, Daleele Alison will walk through how Microsoft AI and automation tools can simplify the way you work. You will see how to eliminate busywork, improve workflows across your team, and create more space to focus on what matters most - giving you hours of your time back.

Daleele will give real-world examples of how other firms are using automation to grow without adding overhead; and will give attendees actionable steps to implement AI-driven workflows in your firm.

Daleele is a technology leader, entrepreneur, and Microsoft Partner committed to helping businesses save time by operating more efficiently. As the CEO and cofounder of RooksDM, he believes the right technology can drive efficiency and growth - ultimately helping businesses go further.

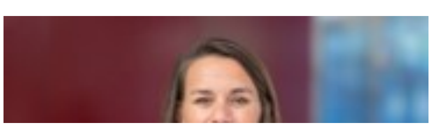
Daleele has always been passionate about technology. He was introduced to computers at a young age and launched his first business selling mix CDs at the flea market. Over time, his drive to solve business challenges through technology grew, leading him to start RooksDM.

He enjoys traveling, exploring local coffee shops, and spending time with his wife and dog. Always looking to bring people together, he has built communities around professional growth and discovering the best coffee shops in the city.

Break

10:50 a.m. - 11:00 a.m.

Lauren Martinelli, CFP®; Vanguard



11:00 a.m. - 11:50 a.m.
(1 hour of CFP CE is pending)
"Behavioral Coaching When Your Clients Need it the Most"

Most

This presentation offers a take on behavioral coaching. Attendees will learn the root causes of why investors need coaching and how they can coach clients to reach their financial goals. They will also learn why behavioral coaching is important not only to their clients but also to their practice. Advisors will learn how they can build deeper relationships with their clients and improve investor and practice outcomes.

Lauren Martinelli, CFP, is a senior investment strategist in Vanguard's Investment Advisory Research Center. She engages with financial advisors on such topics as Vanguard's practice management thought leadership, the financial markets, and investment portfolio construction. After joining Vanguard in 2017, she spent two years in Operations and Corporate Financial Planning. Ms. Martinelli started her professional career at a Fortune 500 consulting firm working on the integration of financial system technology.

She earned her B.S.B.A. in accounting and finance from the University of South Carolina and her M.B.A. with a concentration in finance from Saint Joseph's University. She also holds FINRA Series 7 and 63 licenses and the Certified Financial Planner® certification.

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

Email Roxanne, Chapter Executive

FPA Greater Indiana | P.O. Box 44005 | Indianapolis, IN 46244 US

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