

**From:** Greater Indiana FPA roxanne@fpagreaterindiana.ccsend.com  
**Subject:** Don't Forget to Save your Seat for our first meeting of 2026 on March 13th!  
**Date:** February 26, 2026 at 10:53 AM  
**To:** roxanne.mcgettigan@fpaindiana.org

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**FINANCIAL  
PLANNING  
ASSOCIATION**

GREATER  
INDIANA

**Don't Forget to Save your Seat!**

**March 13, 2026  
Quarterly Meeting**

**NEW VENUE**

**Capital Group | American Funds**

12711 N. Meridian Street  
Carmel, IN 46032

**Registration will close on  
Wednesday, March 11th 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 **breakfast!**

**8:35 a.m. - 8:50 a.m.** Announcements: Adam Cmejla, FPA Chapter President

**8:50 a.m. - 8:58 a.m.** **Gold** Partner Update: Kristen Nelson, Capital Group | American Funds

**8:58 a.m. - 9:06 a.m.** **Silver** Partner Update: Jennifer Hunt, YMCA

**9:06 a.m. - 9:14 a.m.** **Silver** Partner Update: Troy Patton, Archer Investment Corporation

## Amy Florian, Corgenius



**9:15 a.m. - 10:55 a.m.**

*(Accepted for 2 hour of CFP CE, 2 hours of Insurance CE)*

***"Life Happens: Are You and Your Clients Prepared?"***

Understanding, employing, and being able to explain these documents to a client is an invaluable aid to every financial professional. It sets them apart from all the others in the field who are less knowledgeable. It promotes deeper conversations about what the client truly needs to be protected. It turns prospects into clients and clients into life-long relationships. It also provides a path to

actively reach out to the next generation(s) and to the client's trusted inner circle of friends, thus keeping assets with the professional. Overall, it is a strategy for success going forward, because clients can get financial and insurance information everywhere, but they go to the professional who "gets" them in a way that others don't and who is equipped to protect them in every area of their lives.

Amy Florian, CEO of Corgenius specializes in training professionals to communicate effectively with clients through loss and transition.

An acclaimed speaker who's delivered over 1000 speaking engagements on four continents, she has authored over 250 articles and two award-winning books, the recipient of numerous awards for her ground-breaking work, and is a regular feature throughout the financial trade press.

Amy holds a Master's Degree and a Fellow in Thanatology, is a graduate-level instructor, has worked with over 2,500 grieving people, and has taught at firms, corporations, and offices on four continents.

On a personal level, Amy is one of ten children and bakes amazing homemade cinnamon rolls and chocolate chip cookies!

## Partner Power Networking

**10:55 a.m. - 11:25 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.

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

Break

**11:25 a.m. - 11:30 a.m.**

Charo Boyd, Social Security Administration Public Affairs



**11:30 a.m. - 1:10 p.m.**

*(Accepted for 2 hours of CFP CE, 2 hours of Insurance CE)*

***"Social Security Retirement, Spouse and Survivors Benefits Update 2026 with Case Studies"***

Charo Boyd, SSA's Public Affairs Specialist, will conduct an interactive seminar explaining retirement benefits and demonstrating numerous services available at [ssa.gov](http://ssa.gov). She will cover how age and wages affects benefits and explain entitlement factors for Social Security retirement, spouse, ex-spouse, and survivor benefits. Questions and case scenarios will be taken throughout the presentation. A special emphasis will be given to online services available via "mysocialsecurity" and SSA's redesigned website. Enhance your experience, create an account at [www.ssa.gov/myaccount](http://www.ssa.gov/myaccount) and have your Social Security statement (if not receiving benefits) with you during the

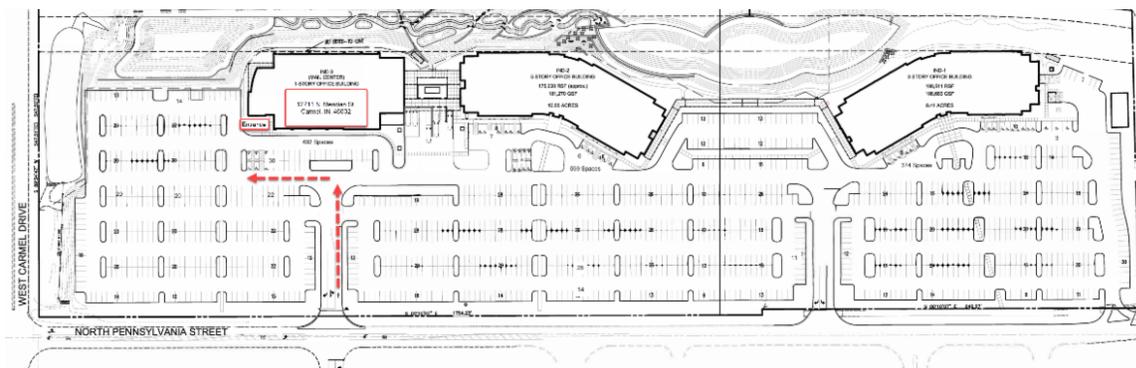
webinar! It is easier to help your clients create an account when you have done it for yourself!

Charo Boyd is responsible for informing the public about SSA programs and benefits. She has been employed with the SSA since 2002. She began her career as a claims representative in the Downtown Indianapolis SSA office. She has worked as an Insurance Specialist in all areas of the Title II Program (Medicare, Retirement, Survivors, and Disability Insurance Benefits).

Boyd has a B.S. in Psychology (Magna Cum Laude) and a M.S. in Guidance & Counseling with a concentration in clinical and organizational counseling all from Tennessee State University.

Boyd received SSA's Regional Communicator Award in 2010 and 2018. She also received Deputy Commissioner's Citations in 2010, 2015, and 2018 from SSA's Office of Communications.

**NEW 2026 MEETING VENUE LOCATION**



The Conference Center that we are meeting in (12711) is the smaller building to the left of the 5-story main building (12811) which has a flag pole at the front of the entrance.

Special thanks to our FPA 2026 Partners:

**Platinum:**



**Gold:**

[BAM Capital](#)  
[Capital Group | American Funds](#)  
[Central Indiana Community Foundation](#)

**Dimensional Fund Advisors**  
**First Trust**  
**Meketa Capital**  
**Oak Street Funding**  
**Palladium Group at Ash Brokerage**  
**SS&C ALPS Advisors**

**Silver:**

[Allianz](#), [Archer Investment Corporation](#), [Barnabas Capital](#), [Eagle & Fein, P.C.](#), [Hageman Group](#), [MarketShare Financial](#), [Merchants Bank](#), [Natixis Investment Managers](#), [Prairie Hill Holdings](#), [Vanguard](#), [YMCA of Greater Indianapolis](#)

**Bronze:**

[Core Insurance Solutions](#), [ES2 Insurance](#), [Fiduciary CFO](#), [Indiana Business Advisors](#)

**Meeting Venue, In Kind:**

[Capital Group](#) | [American Funds](#)

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