

From: Greater Indiana FPA roxanne@fpagreaterindiana.ccsend.com
Subject: Save your Seat for our Meeting on May 8th!
Date: March 26, 2026 at 11:32 AM
To: roxanne.mcgettigan@fpaindiana.org

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**FINANCIAL
PLANNING
ASSOCIATION**

**GREATER
INDIANA**

**May 8, 2026
Quarterly Meeting**

Capital Group | American Funds

12711 N. Meridian Street
Carmel, IN 46032

**Registration will close on
Wednesday, May 6th at Noon**

If you **DO NOT** register by the above deadline, you will not receive Wi-Fi access, which Capital Group provides based on the list of individuals who are registered. This list will be emailed to Capital Group on **May 6th by 2:00 p.m.**

**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.**

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.

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: Alex Weaver, Oak Street Funding
8:58 a.m. - 9:06 a.m. **Gold** Partner Update: Matt Lubbers, BAM Capital
9:06 a.m. - 9:14 a.m. **Silver** Partner Update: Alisa Kolodizner, Prairie Hill Holdings

Brian Eagle, JD; Eagle & Fein, P.C.



9:15 a.m. - 10:05 a.m.

(Accepted for 1 hour of CFP CE, and 1 hour of Insurance CE)

"The ESOP Exit Strategy: Navigating Your Clients' Path from Owner to Legacy"

This presentation provides an overview of Employee Stock Ownership Plans (ESOPs), explaining their structure, benefits, planning process, tax provisions, and real-world applications for business succession and wealth planning. Brian Eagle is a nationally recognized attorney, educator, author and wealth strategy consultant.

Brian is an Indiana University Kelley School of Business alumnus (B.S. Accounting, 1986) and Hofstra University (J.D. 1990). His professional accomplishments include founding the law firm, Eagle & Fein, P.C., of Indianapolis where he serves as managing attorney; co-founding Legacy Administration Services, a company focusing on estate planning administration, and Inheralink[®], a digital estate planning client portal; and founding the Eagle Wealth Planning Institute, where he serves as the Director of the institute.

Brian passed the Certified Public Accountant Examination in 1988 and is a member of the Indianapolis, Indiana State, and American Bar Associations.

Brian resides in Fishers, Indiana with his wife, Kellie, and they are the proud parents of their son, Zachary.

Break

10:05 a.m. - 10:15 a.m.

Gold Partner Update

10:15 a.m. - 10:23 a.m. Gold Partner Update: First Trust Portfolios

Matt Howard, Owner, Howard Medicare and Health Insurance



10:25 a.m. - 11:15 a.m.

(Accepted for 1 hour of CFP CE and 1 hour of Insurance CE)

"The ACA Marketplace in 2026: What Financial Advisors Need to Know"

The expiration of enhanced ACA subsidies after 2025 marks a major shift for millions of Americans and a critical planning opportunity for financial advisors.

This session is designed for advisors who work with early retirees, self-employed individuals, small business owners, and those between jobs or coverages. Matt Howard brings years of hands-on experience enrolling and supporting clients on the ACA Marketplace to walk advisors through eligibility, subsidy calculations and income management strategies to create real premium savings. Advisors will see how common planning moves like Roth conversions and capital gains harvesting can have unintended consequences on health insurance costs.

By applying ACA basics to real-world case studies, attendees will leave with a clear framework for incorporating ACA planning into client conversations, specific questions to ask clients and a solid sense of when to utilize a specialist.

Matt Howard is an owner of Howard Medicare and Health Insurance, an independent health insurance agency serving individuals and families primarily in the Indianapolis area, with licensure across more than 20 states. Founded as a family business, the agency is built around a simple idea: navigating health insurance should feel personal, not transactional. Matt works alongside his father Mark Howard, brother Brian Howard, and sister Rachel Howard, bringing a depth of expertise and a continuity that sets the practice apart.

The agency specializes in Medicare and individual/family health insurance. The transition to Medicare is a particularly critical period when clients are leaving employer coverage, managing early retirement, or approaching age 65 and need to make decisions that will affect their coverage and finances for years to come. With years of hands-on experience enrolling and supporting clients across a wide variety of scenarios, Matt has developed a particular focus on helping clients understand how their coverage decisions affect the cost, accessibility and day-to-day experience of their healthcare.

Matt is a trusted resource for financial advisors and CFP® professionals throughout Indiana, frequently partnering with wealth management teams to ensure that clients' health coverage decisions are fully integrated with their income strategy, tax planning, and retirement timeline. His practical, case-study-driven approach makes a complex subject approachable and actionable for the clients and advisors he works with.

Partner Power Networking

11:15 a.m. - 11:45 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

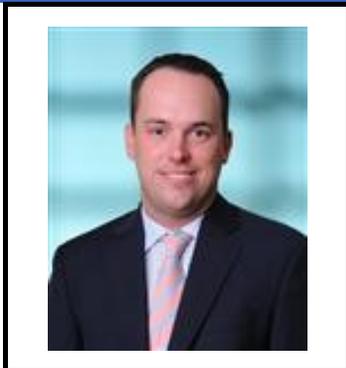
frame. Please put away cell phones, iPads, etc. and listen to our partners while they round-robin and talk for just a few minutes at each table.

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

Break

11:45 a.m. - 11:50 a.m.

Greg Carver and Patricia Taylor, MBA, ChFC, Lincoln Financial Distributors



11:50 a.m. - 12:40 p.m.

(1 hour of CFP CE is pending, 1 hour of Insurance CE is pending)

"Four Tax Planning Strategies Using RIA Class Annuities"

Non-Qualified appreciated annuities can be challenging to unwind from a tax perspective. We will be reviewing unique tax planning opportunities to help mitigate tax impacts to clients and their beneficiaries.



Greg Carver has been with Lincoln Financial for 12 years. He has supported annuity distribution for RIAs for the last 7. Prior to working with Lincoln Financial he spent 7 years as a PGA Golf Professional.

He holds a Business Administration Degree from Methodist University in Fayetteville, NC. Greg has passion for working with financial professionals and developing better retirement outcomes for their clients. He lives in the Philadelphia suburbs with his wife Caitlin and 3 year old son Grayson. When not focusing his time on financial professionals in his territory he enjoys spending time with his family, golfing, and rooting on all Philadelphia sports teams.

Patti Taylor is a member of Lincoln's Annuity Advanced Solutions Team. She is based in Northeast Indiana and provides support to external/internal annuity wholesalers, distribution partners, financial professionals, and their centers of influence across the United States.

Patti has been in the Financial Services arena for 32 years and began her career with Lincoln in 1996.

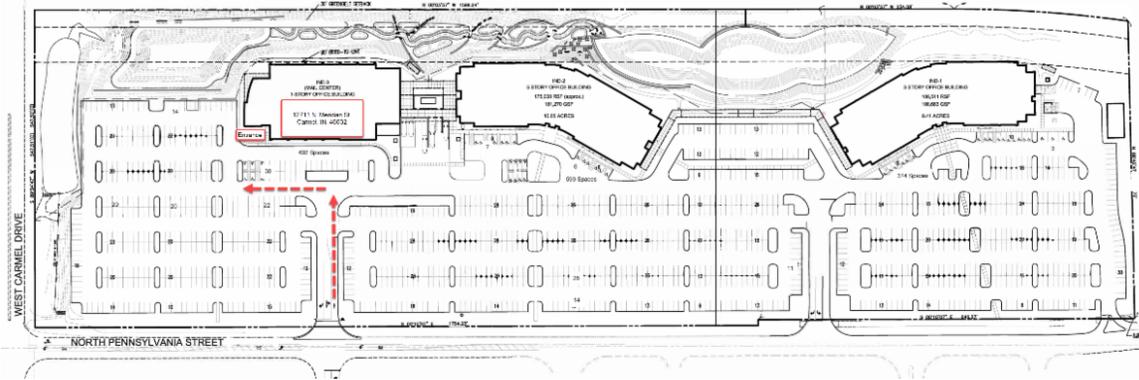
Patti obtained her BS in Finance from Auburn University, Montgomery, Alabama and her MBA from Indiana University, Fort Wayne, Indiana. In 2016 she earned her Chartered Financial Consultant designation. This reflects her desire to continually learn so she can provide the best support and guidance to advisors.

Outside of Lincoln, Patti is involved with her sons in Scouting, riding her horse, hiking, kayaking or tending flower gardens.

NEW 2026 MEETING VENUE LOCATION

12711 N. Meridian Street

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Special thanks to our FPA 2026 Partners:

Platinum:



Gold:

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Bronze:

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

Meeting Venue, In Kind:

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