From: **Greater Indiana FPA** roxanne@fpagreaterindiana.ccsend.com
Subject: Our Last Meeting of the Year is Coming Up!
Date: October 1, 2024 at 10:31 AM
To: roxanne.mcgettigan@fpaindiana.org

FINANCIAL PLANNING ASSOCIATION

GREATER INDIANA

November 15, 2024
Quarterly Meeting

Barnes & Thornburg

11 S. Meridian Street
Indianapolis, IN 46204

5th Floor Conference Center

Registration will close on
Wednesday, November 13th 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.

****

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

Please write (Guest) after their first or last name.
****

PLEASE REGISTER HERE

Meeting Agenda:

8:00 a.m. - 8:25 a.m. Grab a seat, your name-badge and a beverage
8:25 a.m. - 8:40 a.m. Announcements: Adam Cmejla, FPA Chapter President
8:40 a.m. - 8:48 a.m. **GOLD** Partner Update: Adam Farag, Oak Street Funding
8:48 a.m. - 8:56 a.m. **GOLD** Partner Update: Clark Collier, CICF
8:56 a.m. - 9:05 a.m. **SILVER** Partner Update: Brad Willits, iCapital

Melissa Kemp, CFP®, AEP®, CAP®, CNAP®, Premium Organization

9:10 a.m. - 11:10 a.m.
(Accepted for 2 hours of CFP Ethics CE, Melissa will do the CFP filing, 2 hours of Insurance CE is pending)
"Ethics CE+: A Practical Application of the CPF Boards' Code and Standards updated in July 2024"

This interactive presentation will discuss what goes on in someone's mind that allows them to think they can go undetected while committing a fraudulent act. What are the common set of thinking errors and patterns that each of us can be susceptible to on a regular basis?

Common ethical dilemmas that advisors face in today's workplace will also be discussed. Explore how ethics and trust coexist in your practice - and how it affects the relationship you have with your clients.

Melissa Kemp is back again this year! She currently serves as the Executive Director for the Financial Planning Association of Greater Phoenix. Prior to accepting the ED role in 2015, Melissa had been a chapter member since 2000.

She is the founder and owner of Premium Organization and Premium Administration, LLC. Premium Organization provides administrative solutions for many nonprofit organizations, including 501(C)(3), (C)(4) and (C)(6) type entities. Melissa knows how to deliver quality programming under a nonprofit umbrella.

Brunch sponsored by First Trust Portfolios

First Trust

11:10 a.m. - 11:50 a.m. Networking Brunch

11:50 a.m. - 12:00 p.m. Ryan Thomas, First Trust Portfolios

Bryce Gill, First Trust Portfolios

12:00 p.m. - 12:50 p.m.
(Accepted for 1 hour of CFP CE, 1 hour of Insurance CE is pending)
"Era of Uncertainty"

Bryce Gill will review the market performance and give an update and outlook for the US and Global Economy.

Bryce is an Economist and is part of the First Trust Economics Team that Bloomberg has ranked as one of the top forecasters of the U.S. economy over the past several years.

At First Trust, Bryce is responsible for analyzing economic indicators, writing economic commentaries and producing articles on the First Trust Economics Blog. He is also one of First Trust's national speakers, traveling around the U.S. to present timely information on the economy and financial markets to both professional and everyday investors.

Bryce is based in First Trust's Austin, TX office and received an MBA from the University of Texas McCombs School of Business and a BA in Economics from Miami University (Ohio).

Break

12:50 p.m. - 12:55 p.m.

We are bringing Planner's Club to the main stage!

12:55 p.m. - 1:45 p.m.

Monthly, our chapter hosts an educational session on real life redacted client deliverables, industry trends, and specific financial planning modules as advisors work in the financial planning capacity for clients. For the quarterly meeting, we will work through together a real life case study, going through the client profile, data gathering and observations, questions, and ultimately recommendations. This is an exciting opportunity to engage on a real life case with fellow FPA colleagues, especially with all of the perspectives, difference firms, and levels of experience of our members.

Case notes will be shared at the quarterly meeting via QR code.

Don't miss this fun and interactive last session of our November meeting!

Special thanks to our FPA 2024 Partners:

Platinum:

First Trust

INNOVATIVE portfolios

Gold:

Capital Group | American Funds
Central Indiana Community Foundation
Dimensional Fund Advisors
Meketa Capital
Oak Street Funding
Palladium Group at Ash Brokerage
YMCA of Greater Indianapolis

Silver:
Allianz, Charles Schwab Advisor Services, Eagle & Fein, P.C., iCapital, JP Morgan Asset Management, Manning & Napier, Natixis Investment Managers, New York Life Investments, Prairie Hill Holdings, Sandhill Investment Management, Vanguard

Bronze:
Fiduciary CFO, Just Compliance, Vrabec Insurance

In Kind:
Barnes & Thornburg LLP, FORUM Credit Union

FPA of Greater Indiana

P.O. Box 44005
Indianapolis, IN 46244
(317) 373-1355

Email Roxanne, Chapter Executive