



FINANCIAL PLANNING ASSOCIATION

GREATER
INDIANA

FPA is Your Partner in Planning. The Financial Planning Association® (FPA®) is the leading membership organization for CERTIFIED FINANCIAL PLANNER™ professionals and those engaged in the financial planning process. FPA is your partner in planning by helping you realize your vision of professional fulfillment through practice support, learning, advocacy, and networking.

- **OUR MEMBERS:** Our members, who are all involved in financial planning, stretch from Evansville in southern Indiana to South Bend in northern Indiana. Our chapter represents roughly 325 FPA members and serves over 34,920 Indiana households. The FPA nationally serves more than 24,000 members across more than 78 chapters nationwide.
 - 325 Members
 - 34,920 Households served
 - Over \$15B Economic Base

Why is FPA and financial planning important to Indiana?

- Financial planning promotes financial literacy and stability to Indiana consumers from all walks of life and at every economic level. That's good for our state and for the overall economy.

STRATEGIC ALLIANCES: We feel it is extremely important to build the reputation of Financial Planning as a profession that can be trusted in our community. As professionals, we enjoy working across lines with other local professional groups to plan conferences and joint networking events. These professional groups would include:

- The Indiana CPA Society
- The Estate Planning Council of Indianapolis
- The Indianapolis Bar Association
- CFA Society Indianapolis

MEETINGS

- **2025 FPA Greater Indiana Quarterly Meeting Dates:** March 14th, May 9th, September 12th and November 14th.
- **Meeting Times:** The meetings will be from 8:00 a.m. – 12:30 p.m.
- **Meeting Locations:** The March, September and November meetings will be at Barnes & Thornburg (11 S. Meridian Street, Downtown Indianapolis on the 5th Floor). The May meeting will be at FORUM Credit Union Conference & Event Center in Fishers.
- **Additional Meeting:** We will have a smaller meeting in August at MJ Insurance. (DTBD)
- **Meetings/Events may be added to the schedule.**

Please see our website for more chapter information

<https://www.financialplanningassociation.org/chapter/fpa-greater-indiana>



2025 PARTNER BENEFITS

BENEFITS	PLATINUM PARTNER \$6,000 (LIMIT OF THREE NONCOMPETING)	GOLD PARTNER \$3,000 (UNLIMITED)	SILVER PARTNER \$1,500 (UNLIMITED)	BRONZE PARTNER \$750 (1-3 EMPLOYEES)
RECOGNITION AS THE PRESENTING PARTNER AT ONE QUARTERLY MEETING (\$2,000 VALUE)	X			
GUARANTEE SPEAKER SLOT AT ONE QUARTERLY MEETING PER YEAR (SUBJECT TO CONTENT REVIEW)	X			
OPPORTUNITY TO SUBMIT PRESENTATION TO BE CONSIDERED FOR INCLUSION IN A QUARTERLY MEETING (SELECTION SUBJECT TO CONTENT REVIEW)		X		
OPPORTUNITY TO HOST LUNCH IMMEDIATELY AFTER THE MAY QUARTERLY MEETING	X			
SERVE AS AN ADVISOR ON THE FPA BOARD (INVITED TO ATTEND ALL IN-PERSON BOARD MEETINGS)	X			
COMPANY FEATURED IN ONE QUARTERLY NEWSLETTER PER YEAR	X			
DEDICATED PROMOTIONAL EMAIL FROM FPA CHAPTER TO MEMBER DATABASE (CONTENT TO BE PROVIDED BY PARTNER)	2 PER YEAR	1 PER YEAR		
ABILITY TO BROADCAST EVENTS IN CHAPTER NEWSLETTER	X	X		
ELECTRONIC SPREADSHEET OF MEMBERSHIP (AVAILABLE UPON REQUEST)	QUARTERLY	BI-YEARLY	ONE-TIME	
HIGHLIGHT YOUR COMPANY AT THE BEGINNING OF A QUARTERLY MEETING	X	X	X	
FEATURED AD AND/OR ARTICLE IN ONE OF THE QUARTERLY NEWSLETTERS (PROVIDED BY PARTNER)	X	X	X	
OPPORTUNITY TO PARTICIPATE IN DESIGNATED 'PARTNER POWER NETWORKING' SESSION DURING 1-3 QUARTERLY MEETINGS	X	X	X	X
COMPANY LOGO, LINK & CONTACT PLACED ON HOMEPAGE OF CHAPTER WEBSITE	X	X	X	X
COMPANY LOGO AND/OR NAME LINKED IN ALL ANNOUNCEMENTS / NEWSLETTERS SENT TO THE MEMBERSHIP (THRU CONSTANT CONTACT)	X	X	X	X

BENEFITS (CONTINUED)	PLATINUM PARTNER \$6,000 (LIMIT OF THREE NONCOMPETING)	GOLD PARTNER \$3,000 (UNLIMITED)	SILVER PARTNER \$1,500 (UNLIMITED)	BRONZE PARTNER \$750 (1-3 EMPLOYEES)
ATTENDING PARTNERS AT THE QUARTERLY MEETINGS WILL RECEIVE BY EMAIL, A LIST OF THE ATTENDEES	X	X	X	X
OPPORTUNITY TO DISPLAY COMPANY BROCHURES, ETC. AT EACH QUARTERLY MEETING WITH UP TO 2 REPRESENTATIVES ATTENDING (RSVP REQUIRED)	X	X	X	X
SCROLLING RECOGNITION WITH LOGO AT EVERY EVENT/MEETING WITH A PROJECTOR PRESENT (INCREASED SIZE FOR PLATINUM AND GOLD)	X	X	X	X
NETWORKING WITH MEMBERS AT THE QUARTERLY MEETINGS, BEFORE, AFTER AND DURING THE 30 MIN. LUNCH BREAK	X	X	X	X
BENEFIT OF OUR CHAPTER EXECUTIVE WHO WILL WORK WITH YOUR MAIN CONTACT(S) TO ENSURE YOU RECEIVE ALL BENEFITS	X	X	X	X

The Financial Planning Association is the owner of trademark [and registration], service mark and collective membership mark rights in, and various U.S. registrations/applications for: FPA, FPA/Logo and FINANCIAL PLANNING ASSOCIATION. The marks may not be used without written permission from the Financial Planning Association.



PLATINUM PARTNER
GOLD PARTNER, SILVER PARTNER AND
BRONZE PARTNER ENROLLMENT

DATE: _____

Company Name: _____

Contact Name: _____

Phone Number: _____ Cell Number: _____

Full Address: _____

E-mail Address: _____

Web Address: _____

Company Name as you would prefer it to appear in print:

- Annual Platinum Partnership Fee: \$6,000
- Annual Gold Partnership Fee: \$3,000
- Annual Silver Partnership Fee: \$1,500
- Annual Bronze Partnership Fee: \$750 (level is for companies with 1-3 employees only)

(when you first join your annual Partnership begins on the date we receive your payment)

Payment:

- Check:** made payable to the "FPA of Greater Indiana"
- Credit Card:** American Express / Visa / MasterCard / Discover
(the 2.75% credit card fee will be added to your total)

Credit Card Number: _____

Expiration Date: _____ Security Code: _____

Name on Card: _____

Full Billing Address: _____

Phone Number: _____

Mail checks to:

Roxanne M. McGettigan
Chapter Executive
FPA of Greater Indiana
226 N. New Jersey Street
Indianapolis, IN 46204

**2025/2026 PARTNERS OF THE
FINANCIAL PLANNING ASSOCIATION
OF GREATER INDIANA**

(AS OF 2/06/2025)

PLATINUM PARTNERS

First Trust
Innovative Portfolios

GOLD PARTNERS

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

SILVER PARTNERS

Allianz
Allworth Financial
Eagle & Fein, P.C.
Hageman Group
iCapital
JPMorgan Asset Management
Manning & Napier
MarketShare Financial
Merchants Bank
Natixis Investment Managers
Prairie Hill Holdings
Provide
Vanguard

BRONZE PARTNERS

Fiduciary CFO
Vrabec Insurance

IN-KIND PARTNERS

Barnes & Thornburg, LLP
FORUM Credit Union

2025 BOARD OF DIRECTORS:

<p>Adam Cmejla, CFP® Integrated Planning & Wealth Management 317-706-4748 adam@integratedpwm.com</p>	<p>President</p>	<p>Brian Wright, CFP®, MBA Wright Planning 317-537-1987 brian@wrightplanning.com</p>	<p>Chairman and Director of Past President's Club</p>
<p>Austin Angel, CFP® Market Street Wealth Mgmt. Advisors 317-672-1949 austina@mswma.com</p>	<p>President-Elect and Co-Director of NexGen</p>	<p>Brad Yu, CFP®, CPA CAPTRUST Indianapolis 317-663-6120 brad.yu@captrust.com</p>	<p>Treasurer</p>
<p>Shaun Irwin, CFP® Forum Private Client Group 317-752-1751 shaun.irwin@forumpcg.com</p>	<p>Secretary</p>	<p>Matt Sigler, CFP® Busey Wealth Management 317-705-9117 Matt.sigler@busey.com</p>	<p>Director of Membership</p>
<p>Benjamin Banks, CFP® FORUM Private Client Group 317-558-6065 Benji.banks@forumpcg.com</p>	<p>Director of Partnerships</p>	<p>Ed Wildermuth, CFP®, ChFC®, CPA Innovative Financial Solutions 317-324-8018 ed@ioms.com</p>	<p>Co-Director of NexGen</p>
<p>Jeff Hess Palladium Group by Ash Brokerage 317-775-6339 jeff.hess@thepalladiumgrp.com</p>	<p>Co-Director of Programming</p>	<p>David Klaus, CFP®, MBA, CASL®, RICP® Allworth Financial 317-819-7350 david.klaus@allworthfinancial.com</p>	<p>Co-Director of Programming</p>
<p>Chad Reed, CPA, CFP® Valeo Financial Advisors, LLC 317-218-6007 cdreed@valeofinancial.com</p>	<p>Co-Director of Pro Bono</p>	<p>Jesse Vasquez Vasquez Financial Consulting, LLC 317-281-7616 jesse@vasquezfc.com</p>	<p>Co-Director of Pro Bono</p>
<p>Margaret Gooley, CFP®, CDFA® Worley Erhart-Graves 317-872-5090 margaret@wefinancialadvisors.com</p>	<p>Director of Scholarships</p>	<p>Joe Gianoli, CFP® Key Private Bank 317-340-0457 joe@giano.li</p>	<p>At Large Member</p>
		<p>Roxanne McGettigan FPA of Greater Indiana 317-373-1355 roxanne.mcgettigan@fpaindiana.org</p>	<p>Chapter Executive</p>