

From: Greater Indiana FPA roxanne@fpagreaterindiana.ccsend.com
Subject: Our First Meeting of the Year!
Date: February 4, 2025 at 10:50 AM
To: roxanne.mcgettigan@fpaindiana.org

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**FINANCIAL
PLANNING
ASSOCIATION**

**GREATER
INDIANA**

**March 14, 2025
Quarterly Meeting**

Barnes & Thornburg

**11 S. Meridian Street
Indianapolis, IN 46204**

5th Floor Conference Center

**Registration will close on
Wednesday, March 12th 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.

RESERVE MY SPOT!

Meeting Agenda:

8:00 a.m. - 8:35 a.m. Grab a seat, your name-badge and enjoy **the continental 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: Jason Fox, Meketa Capital

8:58 a.m. - 9:06 a.m. GOLD Partner Update: Erik Schulte, Dimensional Fund Advisors

9:06 a.m. - 9:14 a.m. SILVER Partner Update: Alisa Kolodizner, Prairie Hill Holdings

Cozy Wittman, College Inside Track



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

(Accepted for 2 hours of CFP CE, 2 hours of Insurance CE is pending)

"Helping Clients Strengthen their College Search"

The college search continues to become more complex, making it harder for families to identify right fit schools and understand pricing for the education they are purchasing. Challenges include: admission trend changes, testing, the growing number of schools on the 'more selective' list, etc. Learn about these changes and how to help your clients adapt to the constantly shifting college landscape.

As Education and Partnership leader at College Inside Track, Cozy Wittman speaks nationally about college search, educating families and training financial advisors. College search has become increasingly complex, the nuances hard to understand; Cozy is passionate about dispelling myths that cost families money! She's been featured in Barron's Magazine, CNBC as well as The Journal of Financial Planning and many podcasts on the subject of college planning.

Cozy is excited to connect with organizations and families interested in learning more about the complex college search process. She is a mom of 5 kids with very different goals for college, so she is no stranger to the challenges around college search.

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.

Valerie Booker, Capital Group, Home of American Funds



11:30 a.m. - 12:20 p.m.

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

"Pathways to Growth"

What drives growth in the financial services industry? Through our intense research and survey, growth is a result of 3 key factors which we refer to as pathways. This 50 minute presentation outlines the 3 pathways, client acquisition, relationship alpha, and strategic scale. We all know it's not enough to just identify what drives growth. In this presentation you will also hear how to drive growth to increase your probability of achieving higher growth.

Valerie Booker is a national accounts manager at Capital Group, home of American Funds. She has 25 years of industry experience and has been with Capital Group for 18 years. Earlier in her career at Capital, Valerie worked as an area sales representative. Before that, she was a financial consultant at Charles Schwab. She holds a bachelor's degree from Ball State University. Valerie is based in Fishers, Indiana.

Special thanks to our FPA 2025 Partners:

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In Kind:
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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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