

# History of FLP

12/12/69

13 attendees at O'Hare Hotel. L. Duntan  
"Society for Financial Counseling"

College

↓  
CFP

↓  
ICFP

Membership Group - (IAFP)

LORNA DUNTON → CALLED THE MEETING

Teacher, college professor  
NOT CFP. Financial  
+ LORNA

ATTENDEES at O'HARE

Hy Yurman CFP, 73

- CHAIRED FIRST ICFP MEETING

Jevold Glass CFP, 73

John Hawkins CFP, 73

Other 1973 Distinguished Goals

Graydon Calder P.R. ICFP

Colin B. Coombs " "

Kemp Fair " "

Bob Hightower " "

Jordan Korjer " "

DAVE KING " "

DAVE ALLARD PP IAFF

Kay Baird " "

Ron Melanson " "

Chandler Peterson " "

Richard Venezia " "

Larry Wills

## Crosspoint Consulting

Gary L. Pittsford, CFP  
*President & CEO*

9820 Westpoint Drive, Suite 100  
Indianapolis, Indiana 46256.3335  
Phone 317.849.9559 Fax 317.577.8575  
Email GPittsford@aol.com

## McAllister Financial Planning

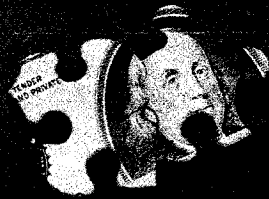
Registered Investment Advisor

[tommcallister.com](http://tommcallister.com)

1098 Timber Creek Dr. #7  
Carmel, IN 46032

317-571-1112  
Cell: 317-371-4311  
[tom@tommcallister.com](mailto:tom@tommcallister.com)

Thomas J. McAllister  
Certified Financial Planner



①

Pittsford <sup>VP</sup> 1204 66<sup>th</sup> chrysler  
 MEA 11 star - club self  
 Nick Kaiser 1st Pres  
 Vince Todd VP  
 Betty Albers - TSIC 1, 2, B

②

TJM - Pres  
 Ken Keller - V.P. mship  
 Vince Todd - V.P. Training  
 Elaine Bellet - Sec'y  
 Nick Kaiser ETHICS

③

Pittsford - NAPFA  
 ELANNE - V.P. mship  
 Mike Sedquist - V.P. Agm - News  
 Betty Albers - Sec'y  
 Paul Morris - TSIC  
 Ethics TJM  
 LH  
 Bayley

(4)

(Bill Conner)

Elaine Belal - Pres.  
 MARK Rushing - V.P. mship  
 JOHN GUY - V.P. Programs  
 ETHICS - Pittsford  
 PAT HIRSCH - Secy  
 ROGER HALL - TSO  
 DICK - Bayley  
 MORRIS  
 Bill Shaw

(5)

John Guy - Pres.  
 KATY McCLANAHAN - V.P. mship  
 CARL GROW - Congress  
 SUSAN MILLS - V.P. P.C.  
 M. Rushing - V.P. Cong  
 Ex VP. Terry Heath - HTTY VP Ed.  
 KAREN CHAMBERLIN - INV3  
 Bill Shaw - TSO  
 Rhoda Israelov - V.P. Personal  
 Skill

Ethics - Elaine Belal  
 NAKPA  
Gene Ziobron



ICFP - 1985

Brent Emerich <sup>pres.</sup> ~~pres.~~ 2 yrs

Ron Olson - TSR

Mike Bosco 10 yrs.

later

Grace Worley - late  
Mike Meiners

Bill Conner

INDIANA ICFP chairman

TJM -

Ken Williams

Max Magna Busco

Rhoda Israelov

Tony Kahl - Punjab

Mary Brown

Sylvia creecium

Noel Reitmeister - AGE

Thomas J. McAllister  
1098 Timber Creek Drive #7  
Carmel, IN 46032  
Phone 317-571-1112 Fax 317-581-1261  
email: mcafintl@aol.com  
Aug. 4, 1999

**Keynote Speech, Financial Planners Joint Meeting**

Sept. 17, 1999

1. History of Financial Planning as a movement.
  - a. Initial Meeting, December 12, 1969, O'Hare Hilton
2. What evolved from this. CFP designation, College, IAFP, ICFP.
3. The Founders.
4. The First Certified Financial Planners, 1973.
5. History of Financial Planning in Central Indiana. 1978-79 - present.
6. First CFPs. IND - Noel Reitmeister, Bob and Sylvia Crecilius, TJM.
7. The Steering Committee. TJM, GLP, Nick Kaiser, Betty Albers, Ron Keller, Jerry Spore, Vince Todd, Paul Morris, L.H. Bayley, Susan Mills. Others. *Jim Keckley - EVP AFNB*
8. First Presidents. Nick Kaiser, Tom McAllister, Gary Pittsford.
  - a. The next wave, Eileen Bedel, John Guy, Carl Grow, etc.
9. The Indiana ICFP Society. Brent Emerick, Ron Dison, Mike Bosco, *FLASCO*  
Grace Worley, *MIKE* Mike Meiners, Bill Conner, Max Magnabosco, ~~\_\_\_\_\_~~
10. The future. Our young profession. Where do we go from here.
  - a. FPA
  - b. Joint meetings
  - c. Governmental Liaison
  - d. Regulation
  - e. Ethics

# Crosspoint Consulting, Inc.

January 7, 2004

Ms. Elaine Bedel  
Bedel Financial Consulting, Inc.  
9190 Priority Way West Drive, Ste 120  
Indianapolis, IN 46240-1437

Mr. Thomas McAllister  
McAllister Financial Planning  
1098 Timber Creek Drive  
Carmel, IN 46032-7138

**RE: HISTORY OF INDIANA CHAPTER**

Dear Elaine and Tom:

Several months ago, I was contacted by Oliver Welch and Denby Brandon in regard to research they are doing on the history of our industry. They're interested in any historical information we have on the IAFP and the original organization of our Indianapolis IAFP chapter. I'm sure they would also be interested in any historical information you might have on ICFP here in Indiana.

I had some old files from the early days of the Indiana chapter and I have tried to reconstruct what took place during the early years, starting in 1979 or 1980.

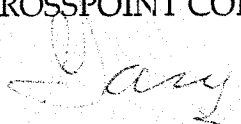
I don't want to rely on my recollection only. I don't know where Nick Kaiser is, and I was hoping both of you could review the enclosed information and add any additional historical information regarding the steering committee and formation of the chapter here in Indiana. I have included my report on the beginning of the Indiana chapter, along with exhibits showing what we were doing in the late '70's.

Both Tom and I are old and don't remember everything. But, Elaine, since you're younger, you might have better recall of the 70's and 80's. If you can get your comments back to me in the next three to four weeks, we can complete this and send it to Oliver and Denby to be included in their history book. If you can email me, I will send you the enclosed "The Beginning of ....." file so you can add your edits.

Thank you for your help.

Sincerely,

CROSSPOINT CONSULTING, INC.

  
Gary L. Pittsford, CFP®  
President and CEO

GLP:lbt

# THE BEGINNING OF THE INTERNATIONAL ASSOCIATION OF FINANCIAL PLANNING

BY GARY L. PITTSFORD, CFP®

BY \_\_\_\_\_

BY \_\_\_\_\_

Back in the mid-1970's, there were several of us in Indiana who were members of the new International Association of Financial Planners, Inc. Yes, that was the original name of our association. In the 1980's, it was changed to the International Association for Financial Planning, Inc.

In 1975 and 1976, many of us in Indiana began talking about the possibility of forming chapters in various cities in the state. Several of us discussed the possibility of having a chapter in Anderson, Muncie, Fort Wayne, and of course, Indianapolis. I personally worked with people in Anderson and Fort Wayne about the possibility of having their own chapters, but we could not get enough members. So we chose to start with a chapter in Indianapolis and branch out from there.

I have reviewed my old personal files to reconstruct the steps taken in the initial formation of our Indianapolis chapter. I am sure I will forget some of the details, but I will make sure others from the original group read this article, and they can fill in any gaps I left.

I believe the three people who initially started pushing for the first chapter were Nick Kaiser, Tom McAllister and Gary Pittsford. I remember the three of us met several times to go over the first steps. Attached is a November 4, 1977 letter addressed to me from the IAFP in Atlanta inquiring about our progress with a steering committee (Exhibit #1). Also attached is a November 9, 1997 memo I sent to many people in Indiana discussing the possibility of forming a new chapter in Indianapolis (Exhibit #2).

After a few months of discussion with some people in the state, we were finally able to form a "steering committee," the first step in the formation of a chapter. Attached is a memo from the first president of the Indianapolis chapter, Nick Kaiser (Exhibit #3). It lists the ten people who were chosen to be on the initial steering committee dated August 10, 1978. On August 31, 1978, the first steering committee meeting was held, and all the important points were covered about forming an Indianapolis chapter of the IAFP. To make everyone in Indiana feel part of the association, we decided to call it "the Indiana chapter of the IAFP." We wanted to use the word, "Indiana," hoping that many people from other cities in the state would pay their dues and join the association. If we could make the Indiana chapter large enough, we could separate some of the other cities into their own chapters in the future. At the start, there was much enthusiasm in the state to have separate chapters. As time went by, we had members

from every major city in the state but never enough to justify their own chapter. After a few years, the Indiana chapter evolved into the Indianapolis chapter.

Initially, an executive committee was chosen, and Nick Kaiser was appointed chairman; Gary Pittsford was vice chairman; Betty Albers was treasurer, and Tom McAllister was secretary. We on the steering committee and others who volunteered accumulated names of people in the financial profession in the state, sending letters and encouraging them to join the Indianapolis chapter of the IAFP.

In the early years, the Indianapolis chapter grew rapidly because people were interested in this profession. In those days, every bank had its own trust department, and many trust officers were interested in joining the association. We also had enthusiasm from stock brokers, insurance agents, accountants and attorneys. This new profession was receiving a lot of publicity, and those who were in some form of this profession were very interested in being part of the new Indianapolis chapter.

It is interesting that on December 6, 1978, we had one of our first chapter meetings, and the featured speaker was Herman W. Yerman, CFP who happened to be one of the original nine or ten people who met in Chicago in 1969 to form the original society that went on to become all of the major associations that exist today, including the FPA, ICPF and the CFP Board of Standards and the College of Financial Planning in Denver.

Mr. Yerman was a friend of Tom McAllister, and I'm sure Tom coaxed him to address our chapter to discuss tax planning, as well as discussing this young and rapidly-growing profession. Today, Mr. Yerman is retired and living in St. Petersburg, Florida. I am sure that he and the others who met in Chicago in the fall of 1969 had no idea what an impact they would have on the financial profession in the United States.

I am not sure that my records are completely accurate, but I believe Nick Kaiser was the first president of the Indianapolis chapter, and he took the position the latter part of 1979 and part of 1980. The second president was Tom McAllister during 1980 and part of 1981, and the third president was Gary Pittsford during 1981 and part of 1982.

Attached is a copy of the minutes from March 26, 1981 showing the board members, most of whom were on the original steering committee (Exhibit #4). However, Elaine Bedel's name shows up as a board member in 1981, and she was secretary of the chapter at that time. Elaine went on to provide many years of service, not only with the IAFP but also with the CFP Board of Standards. Tom McAllister went on to serve on more than one NASD committee in subsequent years.

In the early days, our financial reports for clients were primitive, at best. Computer software was not available for this profession during that time. In fact, in doing research for this article, I found a sample case study that we put together to present at a chapter meeting on March 12, 1982 (I think our office prepared the report because it looks like the type of work we did in the early 80's). This case is attached as Exhibit #5.

The cover letter indicated that Gary Pittsford and Tom McAllister would be leading the discussion on the sample case study for Mr. & Mrs. Cook. It is obvious we were striving to find the best way to provide financial advice to clients and what the reports should look like.

As the years passed, the IAFP chapter grew to over 100 members. In the late 80's and 90's, separate chapters sprang up across the country, including Indianapolis, for the ICFP. This was also an excellent organization. In the last few years, the IAFP and ICFP have merged into one organization. Here in Indianapolis, the FPA continues to function every year and always attracts the real professionals in the industry.

Chapters in the cities across the country were very important to our new association that was being formed in 70's and 80's. They provided leaders in the financial communities in the respective cities, and many of them moved on to become leaders in regional organizations, as well as leaders in one or more of the national organizations. The leaders of our local chapters were always a source of information when the national organization needed valuable input. The national organizations always depended on local leaders to inform them of important topics, what was happening in their part of the country, feelings by local members about national activities and many other topics. Those who have served on the board of directors, or as an officer, of our local chapter have provided valuable input on all our regional and national activities over the years since we started in 1978. Even after approximately 24 years, our Indianapolis chapter continues to be strong and is an important leader in the financial community. Many of our original board members still faithfully attend monthly meetings and help younger members just coming into the profession.

Looking to the future, I hope the Indianapolis chapter of the FPA continues to be a training ground for leaders in our associations or other associations in Indiana and nationally. I hope our members continue to help families in Indiana to improve their financial position and encourage young people who are thinking about a lifetime career in the financial world to join some branch of this industry.

# International Association of Financial Planners, Inc.

2150 Parklake Drive, N.E., Suite 260 • Atlanta, Georgia 30345 • (404) 934-0533

November 4, 1977

## EXECUTIVE COMMITTEE

### CHAIRMAN OF THE BOARD

C. Robert Strader  
Financial Services  
Atlanta, GA.

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C. William Hoilman, CFP  
Mitchell, Hoilman & Associates  
Boston, MA

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Atlanta, GA

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International Association of  
Financial Planners, Inc.  
Atlanta, GA

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Financial Services Corporation  
Dallas, TX

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### Graydon K. Calder, CFP

Delger Financial Corporation  
San Diego, CA

### Bill Carter, CFP

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### John Dixon, CFP

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### Dale E. McClelland, CFP

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Flint, MI

### Nicholas C. McDaniel, JD, CLU, CFP

Dean Witter & Co., Incorporated  
San Francisco, CA

### Eric H. Medrow, CFP

First Investment Annuity Company  
Valley Forge, PA

### Ronald A. Melanson, CFP

R. A. Melanson & Company  
Monterey, CA

### Henry I. Montgomery, CFP

Keller, MacCallum, Montgomery  
& Nelson, Inc.  
St. Paul, MN

### Storvyn ("Nick") Nannes

American Pacific Securities Corp.  
Anaheim, CA

### Richard A. Stone, CFP

Stone, Thomas & Stimpfig  
San Francisco, CA

### Robert J. Underwood, CFP

Southern Financial Advisors, Inc.  
Birmingham, AL

### Frederick J. Wertlieb, CLU

Computone Systems, Inc.  
New York, NY

### Richard A. Young, CFP

Financial Strategies, Inc.  
Chicago, IL

Mr. Gary L. Pittsford  
G. L. Pittsford & Associates  
P. O. Box 1008  
Anderson, IN 46015

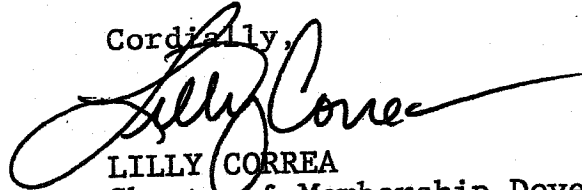
Dear Mr. Pittsford:

I am writing to inquire about the progress of the Steering Committee for the Indiana IAFP Chapter. As I mentioned before, we cannot proceed to consider Indiana a developing chapter until we receive the names and addresses of your Steering Committee, composed of eight to ten bonafide IAFP members.

We have had inquiries about a local Chapter in Indiana and I have referred several members in your area to you.

Please let us know as soon as possible the status of your Steering Committee so that your Chapter can qualify for monthly reimbursements from the National Office. Moreover, let us know of any additional support we can provide in your chapter development efforts.

Cordially,



LILLY CORREA

Chapter & Membership Development



*G. L. Pittsford & Associates*

TAX AND FINANCIAL PLANNING

*P.O. Box 1008  
Anderson, Indiana 46015*

November 9, 1977

Dear Financial Planner:

We are going to form a local chapter for the International Association of Financial Planners in the Anderson area in the month of November. It is my desire to encourage everyone in the state of Indiana to become a member of our chapter once it is established.

Here in the Midwest we have laid back and waited, watching other states in the West and the South, to organize several city chapters within each state, and then even establish a state-wide organization which sponsors state-wide conventions. I think it is time that we here in Indiana step forward and organize ourselves to the point where we also have several city-wide chapters and a state-wide organization so that we can better help each other, and also help our clients.

What I would like to do is to encourage individuals from each city in the state to join the International Association of Financial Planners, and as the membership within the state and within each city grows we will be able to spin off groups of 20 or 30 members into city-wide or county-wide organizations. I realize that some cities are not large enough to support a chapter by themselves, however, this problem can be solved by combining three or four counties together to provide the membership needed to have an active, ongoing chapter.

In the months ahead, I would like to visit as many cities as possible, and meet with each of you to discuss the possibilities of forming a local chapter. If you have a strong desire to help attract new members, or to help organize a local chapter, please write me a letter explaining your thoughts as soon as possible. I would like to start off the new year with a strong membership drive throughout the state. Hopefully, in 1978 we will be well on our way to having a state-wide organization.

November 9, 1977

Please remember that being a part of a local chapter or a state-wide organization will not be a burden on you; it will be an asset. By belonging to an organization whose sole purpose is to help each of us improve ourselves, there is no way that it can become a liability for you, because if the local chapter is not helping each and every member, then it should not exist, and you should not be wasting your time attending meetings.

Meetings and each function of the local chapter should be centered around helping the members learn new and beneficial ideas that can be transformed into better services for your clients, and better income for yourself.

Please send me a letter and let me know your thoughts as to your desires for either a local chapter or a state-wide organization.

Sincerely,

G. L. Pittsford

GLP:vs

cc: Miss Lilly Correa  
Mr. Fred Harris

AUG 21 1978

To: IAFP Members and Friends Residing in Indiana.  
From: Nick Kaiser  
Re: Indiana Chapter, International Association of Financial Planners

In response to an earlier notice, a meeting was held in Indianapolis on August 3rd to explore interest in forming an Indiana financial planning association. Fifteen people indicated they would try to attend, of whom nine actually arrived. Informal discussion revealed sincere interest and willingness to work for an Indiana IAFP chapter.

A list of ten individuals, all members of the IAFP and presently willing to serve as a Steering Committee for an Indiana chapter, is printed on the reverse side. Since this list has now been received at Atlanta headquarters, Indiana is officially on the roster as a developing chapter and will receive \$30 of each \$60 member dues paid by Indiana residents joining the IAFP. The list does not mean that membership on the Steering Committee is closed - indeed, it is hoped that more will show a willingness to join the Steering Committee now that they can become eligible by joining the IAFP in a manner that will significantly benefit the local chapter (i.e., the rebate).

A WORK SESSION geared toward starting a local chapter was scheduled for Thursday, August 31st again at 8:00 A.M. at the Columbia Club on Monument Circle. This is not a general membership meeting, but for those willing to be active leaders in the planning and development of an Indiana IAFP chapter. The first general membership meeting is tentatively planned for the late afternoon, sometime around October 4th.

Please feel free to contact me for any further information.

INTERNATIONAL ASSOCIATION OF FINANCIAL PLANNERS

INDIANA CHAPTER

Steering Committee as of August 10, 1978

1. Everett J. Coleman                      Box 546, Lebanon, Indiana 46052  
Kelly & Morey, Inc. 482-0202
2. Lowell R. Duzan                        Box 40007, Indianapolis, Indiana 46240  
Carnegie International Corp. 844-5381
3. Stuart T. Felton                        Box 40064, Indianapolis, Indiana 46240  
Houston Council of Trusts 542-1118
4. Wayne Griffith                         Box 68192, Indianapolis, Indiana 46268  
University Life Insurance 871-4200
5. Nicholas Kaiser                        20 N. Meridian Street, Indpls., Ind. 46204  
Unified Management Corporation 634-3301
6. Thomas J. McAllister                   2606 Bluffwood W. Dr., Indpls., Ind. 46208  
McAllister Financial 283-6263
7. Louis G. Mohlman                       2900 Woodland Dr., Box 586, Logansport, Ind. 46947  
E. F. Hutton Financial Services (219) 753-3317
8. Gary L. Pittsford                      Box 1008, Anderson, Indiana 46015  
Pittsford & Associates 643-3364
9. Art W. Rothfuss                        Box 40007, Indianapolis, Indiana 46240  
Carnegie International Corp. 844-5381
10. W. Gregory Wright                     149 N. Pennsylvania St., Indpls., Ind. 46204  
Merrill Lynch 262-4189

Action Taken

Discussion Topics

I. Forming the Steering Committee

1. Concept
2. Make-up
  - a. Balance
  - b. Committed to financial planning and working hard
  - c. Flexibility - allow additions and deletions
3. Executive Committee

Nick - a. Chairman  
ma - b. Vice Chairman  
Beth - c. Treasurer  
Tom - d. Secretary

II. Establishing Priorities and Objectives

- 100-200 - 1. Chapter membership goal
- YES - 2. Balance
- 3 meetings - 3. A few high-powered meetings
- Later - 4. Regional seminar
- YES - 5. Operate w/o formal organization until membership goal reached
- YES - 6. Maximize chapter revenue
- Vince - 7. Organize CFP course

III. Creating a List of Potential Members

1. Balance
2. Include other cities in Indiana
3. Target size of list
4. Sources
  - a. IAFP members, past & current
  - b. Life insurance community
  - c. Securities community
  - d. Financial planning professionals
  - e. Contacts
5. List Maintenance

IV. Initial Membership Drive

1. Concept to sell
  - a. IAFP membership benefits
  - b. Membership to have meetings
  - c. Membership helps chapter finances
  - d. Association w/ other professionals
2. Approach
  - a. Build mailing list
  - b. General letter(s) about meeting(s)
  - c. Personal phone calls
  - d. Reminder notice(s)
  - e. Hold meeting(s)
  - f. Follow up

*G. L. Pittsford & Associates*

TAX AND FINANCIAL PLANNING

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*P.O. Box 1008  
Anderson, Indiana 46015*

October 18, 1978

Mr. Nick Kaiser  
Unified Funds  
20 N. Meridian Street  
Indianapolis, IN 46204

Dear Nick:

Enclosed is the mailing list which I said I would furnish you for the upcoming IAFP Chapter meeting on November 6. When you send these individuals a letter, please send me a copy so that I know what the content of the letter says. A few days prior to the meeting I will call all of these individuals to make sure that they have not forgotten the meeting in November.

I hope that everything goes well, and that we can get our chapter started with a big success. Please keep in touch with me so that I can help you with the work to be done.

Sincerely,

G. L. Pittsford

GLP:ga

Enclosed mailing list

MAILING LIST FOR INDIANAPOLIS IAFF CHAPTER

YES - Mr. Jim Christophersen  
Thomson McKinnon  
936 Meridian Plaza  
Anderson, IN 46015

NO - Mr. Bernie Hanson  
Thomson McKinnon  
936 Meridian Plaza  
Anderson, IN 46015

Mr. Dick Kreegar  
406 E. Main  
Chesterfield, IN

YES - Mr. Charles Stinard  
Anderson Banking Co.  
931 Meridian Plaza  
Anderson, IN 46016

Mr. Marvin Lowe  
617 Nichol Avenue  
Anderson, IN 46014

YES - Mr. Terry Temple  
515 W. Sycamore  
Kokomo, IN 46901

YES - Mr. Bill Pitman  
515 W. Sycamore  
Kokomo, IN 46901

Mr. John Bundy  
Howard Webb Insurance & Real  
Estate Inc.  
525 E. 8th Street  
Anderson, IN

YES - Mr. Blanchard Shearer  
664 Citizens Bank Bldg.  
Anderson, IN 46016

Mr. John K. McCain  
United Prudential Life Insurance  
217 Southway Blvd., East  
Kokomo, IN 46901

YES - Mr. Sherman J. Updegraff  
Thomson McKinnon  
936 Meridian Plaza  
Anderson, IN 46015

YES - Mr. Dick McConnell  
Financial Services  
7518 Kruge Drive  
Ft. Wayne, IN 46809

YES - Mr. Ray Hart  
P.O. Box 134  
Middletown, IN 47356

YES - Mr. Paul Morris  
Shearson Hayden Stone Inc.  
25 Monument Circle  
Indianapolis, IN 46204

Mr. Dante A. Raggio  
K. J. Brown Co, Inc.  
122 E. Main Street  
Muncie, IN 47305

Mr. John Fogle  
P.O. Box 88187  
Indianapolis, IN 46208

Mr. Gene Tanner  
20 N. Meridian Street  
Indianapolis, IN 46204

# International Association of Financial Planners, Inc.

INDIANA CHAPTER

DEC 4 1978

## FINANCIAL PLANNERS MEETING

December 6, 1978

5:00 PM

AFNB First Floor Auditorium, Monument Circle  
Indianapolis

Featured Speaker will be Herman W. Yurman, CFP. Past Chairman - International Association of Financial Planners, Inc. Vice Chairman - College for Financial Planning. President - ALPHA/OMEGA Planning Corp., St. Petersburg, FL. Mr. Yurman is one of the country's best known Financial Planners. He lectures widely and is Co-Author of "The Basics of Financial Planning", primer for the financial planning movement. His encyclopedic knowledge of the Tax Code always makes an interesting and unique program. Mr. Yurman will address the New Tax Bill (1978) and how it relates to what went before. This often overlooked aspect of changes in the Tax Code is of vital importance to all Financial Advisers.

"Mr. Yurman's speech will be like no other tax orientated speech you have ever heard." - G. L. Pittsford

"Mr. Yurman is the Financial Planner's Financial Planner." - G. L. Pittsford

"There are only 9 experts in the country, the Supreme Court, and they usually disagree 5 to 4." - H. W. Yurman



IAFP Board Meeting  
March 26, 1981  
7:30 a.m.  
Mac's Steakhouse

Attendees:	Tom McAllister	Nick Kaiser
	Gary Pittsford	Mike Sechrist
	Ron Keller	Paul Morris
	Betty Albers	Vince Todd
		Elaine Bedel

Meeting called to order by Tom McAllister, President. An income and expense statement as of March 26, 1981 was distributed by Betty Albers, Treasurer, with an ending balance of \$502.85.

V.P. Programs, Gary Pittsford, reported on the upcoming seminar:

- 1.) Brochures with cover letters will be sent to all IAFP members and prospective members.
- 2.) Five extra brochures will be sent to Board members for distribution.
- 3.) Interview of speakers with local reporters will be set up by Kaiser and McAllister.
- 4.) Board members are invited to entertain speakers who arrive evening before seminar.
- 5.) Name tags for Board members and IAFP members should be distinguishable from others attending seminar
- 6.) Pittsford will make a final report concerning advantages and disadvantages of working with ICLEF.

The next membership meeting will be a breakfast meeting on May 12. Sechrist will discuss with the Essex Hotel possible arrangements for the meeting. Pittsford will approach Tom Underwood to be the speaker.

V.P. Education, Vince Todd, reported the formation of a study group for the CFP in this area. Members will be notified.

V.P. Membership, Ron Keller, indicated a booth will be located at the seminar with membership applications and information.

Next Board meeting is April 15 at 7:30 a.m. at Mac's Steakhouse.

Meeting Adjourned.

Submitted by  
Elaine E. Bedel  
Secretary

IAFP  
Indiana Chapter

May 6, 1981

Letter from the President

Dear IAFP Member:

The proposed breakfast meeting scheduled for May 10 has been canceled due to our speaker being unavailable on that particular day. We are attempting to reschedule the program for early June and will send a membership notice as soon as we are firm. In addition, our annual election dinner meeting will be held in late June. More on this later too.

Our first day long seminar, April 24, was a real success. Those of you who attended enjoyed a stimulating, educational experience. Those who did not should make plans now to attend next year. In cooperation with the Indiana Bar Association through their Indiana Council for Continuing Legal Education we had an outstanding group of speakers covering the subject of Wealth Management. My thanks to Gary Pittsford, Program Vice President, and his committee for a fine job.

May is also membership month and the IAFP is making it especially rewarding to encourage our solicitation of new members. Rules for the membership drive are too lengthy to cover in this letter, but as an incentive, each existing member recruiting a new member during May will receive a \$15 certificate toward the national convention, or the purchase of an IAFP Financial Planner Professional Development Program module. So - let's get to work. Don't hesitate to call Ron Keller (634-3300) or any board member for help.

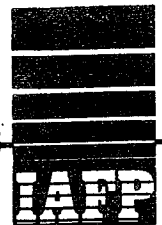
Nominations for the Board of Directors for the upcoming year are now open. Our past president, Nick Kaiser, is chairman of the nominations committee and he would appreciate hearing from you if you are interested in serving on the Board. Phone 634-3301. The Board will elect officers for the coming year (July 1 - June 30, 1982) after they are elected in June.

Thomas J. McAllister CFP  
President

MAY 08 1981

AUG 07 1981

FILED



IAFP - Indianapolis Chapter

August 6, 1981

Dear Planner:

In an attempt to keep our members up-to-date, we have arranged for Mr. Paul Corsaro and Mr. Alan Dansker of Bingham Summers Welsh & Spilman to present the new tax bill, at our August meeting.

There are many changes, which will effect income taxes, estate and many other areas. Please come to our meeting with some specific questions that are important to you.

The meeting has been delayed (1) week, until August 18, 1981, to fit our speakers schedule. The meeting will be from 4:45 pm until 6:00 pm and will be held at the Indiana National Bank Tower, 5th Floor Auditorium.

Please mark your calendar for August 18th, I look forward to seeing you then.

Sincerely,

G. L. Pittsford, President

MAR 16 1982

IAFP File

International Association of Financial Planners, Inc.

INDIANAPOLIS CHAPTER

Claim - 266-6588  
Number - 800-382-1700

March 12, 1982

On Tuesday, March 23, at 4:30 P.M. our Chapter President, Gary Pittsford, and Past President, Tom McAllister, will lead a discussion of the Case Study, which is enclosed for members. Mr. and Mrs. Cook are representative of many of the corporate executives needing and wanting financial counseling, and we believe it is an interesting and challenging one. Those attending will be separated into "Round Tables" and asked to give their own ideas as to how an overall conceptual plan for the Cook's should be evolved. After a 45 minute discussion period a representative from each table will be asked to present the concensus opinion from his or her table. Comments and suggestions will then be welcome from the floor.

For the experienced financial planner this exercise represents an excellent opportunity to hone and refresh one's skills. For the beginner it is an opportunity to exchange ideas with your peers and learn from them.

We urge all our members to attend. Please be sure you have reviewed the Case Study and are familiar with the Cook's and their problems. As always, guests and prospective members are welcome. Call Betty Albers at 634-3300 for a copy of the case study.

Place: Indiana National Bank Auditorium  
5th Floor  
One Indiana Square

Time: 4:30 P.M.

Date: March 23, 1982

## ADDITIONAL CASE STUDY INFORMATION

1. The wife has developed a health problem and has required open heart surgery. She is currently using a pace-maker and she is also on medication.

### Questions

1. Should Mr. Cook retire, or should he continue to work to accumulate more wealth for retirement income?

2. Does Mr. Cook have enough life insurance to protect him or should we suggest that he purchase more?

3. Do you see any suggested changes in his wills and trusts?

4. Mr. Cook currently has a large amount of cash. What investment possibilities would you suggest for this very conservative corporate executive?

5. Mr. Cook has three homes in three different states. What problems and possibilities do you see pertaining to his real estate holdings?

A PERSONAL FINANCIAL PLAN

FOR

MR. and MRS. C. P. COOK

March 15, 1982

Volume I

STATEMENT OF NET WORTH  
(as of 9/30/81)

<u>Liquid Assets</u>	<u>Amount</u>	<u>Percent of Total Assets</u>	<u>Expected After-Tax Return (Cost) (10)</u>
*Cash/Checking Accounts (1)	\$ 24,600	2.5%	0.0 %
*Savings Accounts (2)	17,700	1.8%	2.75%
*Treasury Bill (3)	100,000	10.0%	7.5 %
*Municipal Bond Funds (4)	77,300	7.7%	10.3 %
*E.J.Lilly Stock (5)	49,800	5.0%	10.7 % (11)
*Demand Note	<u>85,300</u>	<u>8.5%</u>	<u>14.2 %</u>
 Total Liquid Assets	 <u>\$ 354,700</u>	 <u>35.5%</u>	 <u>9.4 % (12)</u>
 <u>Illiquid Assets</u>			
E.J. Lilly Savings Plan(6)	\$ 147,000	14.7%	-
Stock Option Equity (7)	15,000	1.5%	-
TRAESOP (8)	2,600	.3%	-
Principal Residence	110,000	11.0%	-
Idaho Home	100,000	10.0%	-
Florida Condominium	110,000	11.0%	-
Personal Property (9)	<u>162,000</u>	<u>16.0%</u>	<u>-</u>
 Total Illiquid Assets	 <u>\$ 646,600</u>	 <u>64.5%</u>	 <u>-</u>
 Total Assets	 <u>\$1,001,300</u>	 <u>100.0%</u>	 <u>-</u>
 <u>Liabilities</u>			
Federal Income Tax	\$ (19,000)	1.9%	-
 Total Liabilities	 <u>\$ (19,000)</u>	 <u>1.9%</u>	 <u>-</u>
 NET WORTH	 <u>\$ 982,300</u>	 <u>98.1%</u>	 <u>-</u>
 *Investment Assets	 <u>\$ 354,600</u>	 <u>35.5%</u>	 <u>9.4 %</u>

(1) Footnotes appear on following pages.



- (6) Savings Plan value as of 8/31/81. See Employee Benefits Section for 1/1/82 projection, tax liability and recommendation.
- (7) Stock Option Equity calculated in Employee Benefits Section.
- (8) 39.5 shares at \$65.00 per share. Expected to be about 49 shares at retirement.

(9) <u>Personal Property</u>	<u>Replacement Value</u>	<u>Liquidation Value</u>
Residence Furnishings	\$ 40,000	\$ 20,000
Florida Furnishings	25,000	20,000
Idaho Furnishings	25,000	15,000
Cadillac	7,000	7,000
Olds	5,000	5,000
Coin Collection	10,000	10,000
Jewelry & Silver	50,000	25,000
Total	<u>\$162,000</u>	<u>\$102,000</u>

- (10) Assumed a 53% marginal tax bracket (Federal and State), which is valid for 1981 earned income and all income after 1981. Marginal tax bracket on investment income in 1981 is 72% (Federal and State).
- (11) Based on a 5.4% yield and 10% growth.
- (12) Weighted Average.

1981 ESTIMATED TAX LIABILITIES

	<u>FEDERAL</u>	<u>INDIANA</u>
Salary	\$169,500	\$169,500
Financial, Legal & Tax Services	8,000	8,000
Group Life Insurance	4,620	4,620
Dividends - Net of Exclusion	2,500	2,500
Interest - Treasury Bills & Savings	27,400	1,500
Capital Transactions	-	-
Club Dues Paid by E.J. Lilly	2,500	2,500
Stock Appreciation Rights	<u>96,954</u>	<u>96,954</u>
 Adjusted Gross Income	 \$311,474	 \$285,574
 Contributions	 (3,000)	 (3,000)
Interest	-	-
Taxes - Other than Income	(4,200)	(4,200)
Miscellaneous	(9,000)	(9,000)
Income Taxes:		
Federal Liability	-	(139,707)
FICA	-	(1,975)
State Withholding	(7,601)	-
Zero Bracket Amount	3,400	-
Personal Exemptions	<u>(3,000)</u>	<u>-</u>
 Estimated Taxable Income	 <u>\$288,073</u>	 <u>\$127,692</u>
 Tax	 \$139,707*	 \$ 7,584
Less:		
ERTA Credit (1¼%)	(1,746)	-
Salary Withholding	(58,402)	(4,692)
Bonus Withholding	-	-
Est. Payments(per orig. estimate)	(60,960)	-
Stock Apprec. Rights Withholding	<u>(19,391)</u>	<u>(2,909)</u>
 Balance Due (Refund Due) 4/15/82	 <u>\$ (792)</u>	 <u>\$ (17)</u>

\* Calculated using maximum tax on earned income.

- Item 12: Trust Compensation.
- Item 13: Will provisions if CDC elects to take against the Will.
- Item 14: Under simultaneous death: CDC presumed to survive CPC.
- Item 15: The Bank, in Indianapolis, Indiana, is named Executor and Trustee.
- Item 16: MPC's Guardian named.
- Item 17: Division of Estate Income.
- Item 18: Directs Executor to exercise stock options if beneficial to the estate.

#### CDC's Estate Plan

Carol's estate plan is commonly referred to as a simple estate plan because all assets are left to Chester or, in the event he predeceases her, to Michael, outright or in trust, depending upon his age.

#### CDC's Will (12/9/71)

- Item 1: Authorizes Executor to pay expenses of last illness, funeral expenses and lawful debts.
- Item 2: All real estate to CPC (if he survives her).
- Item 3: All personal property to CPC (if he survives her).
- Item 4: Presumption that CPC predeceases CDC if deaths are simultaneous.
- Item 5: Appointment of MPC's guardian.
- Item 6: Intent not to exercise any powers of appointment.
- Item 7: Estate residue to CPC (if he survives her).
- Item 8: If CPC predeceases CDC, then estate residue to MPC (if MPC is at least 21 years of age).
- Item 9: If CPC predeceases CDC and MPC is less than 21 years old, residue goes to trust established in CPC's Will.
- Item 10: CPC is named as Executor, or alternatively, The Bank.

BENEFICIARY DESIGNATIONS

<u>Life Insurance</u>	<u>Amount</u>	<u>Beneficiary</u>	<u>Owner</u>
On Client -- Personal Insurance:			
NONE			
On Client -- Company Insurance:			
GROUP TERM	\$115,625*	Estate	CPC
On Spouse -- Personal Insurance:			
NONE			

<u>Company Benefits</u>	<u>Amount</u>	<u>Beneficiary</u>	<u>Owner</u>
Savings Plan	\$147,000	**	**
TRAESOP	\$ 2,600	**	**

<u>Trusts</u>	<u>Amount</u>	<u>Beneficiaries</u>	<u>Trustor</u>	<u>Trustee</u>
Testamentary A/B	Unfunded	CDC/MPC	CPC	The Bank

---

\* Post retirement amount (25% of \$462,500)

\*\* After retirement these assets will be part of Chester's probate estate unless he puts the proceeds into joint assets, joint accounts or a living trust.

\$23.00 per day for doctor's hospital visits (\$1,610 maximum).

100% of diagnostic services outside the hospital up to \$300 annually.

100% of doctor's charges for emergency care (i.e., within 24 hours of an accident) up to \$40.00 per occurrence. Also subject to diagnostic services limitation above.

100% of maternity surgery charges subject to a \$600 maximum for normal delivery, \$950 for a cesarean and \$200 for a miscarriage.

Note: Certain surgery may be performed as an outpatient in an approved surgical center, doctor's office or hospital outpatient facility or as an inpatient. Under the first alternative, payment is based on doctor's charges rather than the surgical schedule. Therefore, the employee should determine prior to the operation which alternative will result in a higher benefit.

#### Major Medical

Major medical applies to most medical expenses not covered by the Basic Benefits. After a \$100 annual deductible, major medical pays 80% of the next \$2,000 and 100% of any amounts in excess of \$2,000.

In short, your maximum exposure while you are employed is \$500 per year per person (\$100 deductible plus 20% of \$2,000). The maximum annual benefit is \$200,000 and the maximum lifetime benefit is \$400,000.

#### Retiree Benefits

Retiree benefits are provided to employees who have 10 years of Benefit Service and are eligible for a pension. Prior to age 65, the employee receives the same benefits as he/she did prior to retirement. After age 65, the plan supplements medicare. However, the maximum benefit which is paid under the plan is \$25,000. After that amount is reached you have a right to convert to a personal policy which has limited coverage.

1998-1999  
IAFF OFFICER FACT SHEET

POSITIONS EFFECTIVE 7/1/98  
DUE DATE JULY 1, 1998

6/30

(PLEASE VERIFY THAT ALL OFFICERS ARE IAFF MEMBERS)

TYPE OR PRINT ONLY

Chapter Name: Indianapolis Chapter 66 20

Submitted by: Leonard L. Neisler Title: President

Date Submitted: June 30, 1998 Date Election Held: \_\_\_\_\_

CHAPTER ADMINISTRATOR

(IF NEW ADMINISTRATOR, PLEASE PROVIDE A MEMBERSHIP APPLICATION WITH FACT SHEET)

Full Name: Kim Stoneking 15 999 ✓

Company: Indianapolis Chapter - IAFF

Address: 3009 East 96<sup>th</sup> Street

City/State/Zip: Indianapolis, IN 46240

Office Phone: (317)844-6268 Designated IAFF Line? Yes \_\_\_ No x

Fax Number: (317)844-7659 e-mail Address: kims@trinet1.net

Alternate Address: Please provide street address if P.O. Box used above  
\_\_\_\_\_  
\_\_\_\_\_

Board of Directors Meeting Schedule: 08/14/98, 10/02/98, 01/15/99, 03/19/99, 05/07/99  
All meetings are from 7:00 AM to 9:00 AM

Chapter Monthly/Quarterly Meeting Schedule, i.e., every 3<sup>rd</sup> Wednesday

September, November, February, April, June  
Specific dates to be determined

**RECIPIENT OF MONTHLY MEMBERSHIP PACKAGE**  
*(Member rosters, labels, statistical reports, etc.)*

Position: Membership Chairman  
Full Name: Mark Peterson 23536 ✓  
Company: NBD Bank  
Address: One Indiana Square  
Suite 7061  
City/State/Zip: Indianapolis, IN 46266  
Office Phone: (317) 266-6508  
Fax #: (317) 266-5568  
e-mail Address: mark.peterson@em.fcncbd.com

**RECIPIENT OF MONTHLY REIMBURSEMENT CHECK**  
*(Chapter reimbursement w/ deductions)*

Position: Treasurer  
Full Name: Douglas Ehlen, CPA 129115 ✓  
Company: Ehlen Heldman & Company  
Address: 130 East Epler Avenue  
  
City/State/Zip: Indianapolis, IN 46227  
Office Phone: (317) 786-8001  
Fax #: (317) 786-8030  
e-mail Address: dbxyz@AOL.com

**BOARD OF DIRECTORS**  
1998-1999  
EFFECTIVE 7/1/98

**PRESIDENT**

Name: Leonard L. Neisler 62944  
Company: The Financial Group, Inc. ✓  
Address: 8250 Haverstick Road  
Suite 110  
City/State/Zip: Indianapolis, IN 46240-2401  
Office Phone: (317) 726-2530  
Fax #: (317) 726-2539  
e-mail Address: neislerl@compuserve.com

**SECRETARY**

Name: Hal Thompson  
Company: Seniors Unlimited ✓  
Address: 1171 N. Meridian Street  
Suite 100  
City/State/Zip: Carmel, IN 46032  
Office Phone: (317) 843-5880  
Fax #: (317) 843-5289  
e-mail Address: hal-t@seniors-unlimited.com

**MEMBERSHIP VICE PRESIDENT**

Name: Mark Peterson  
Company: NBD Bank ✓  
Address: One Indiana Square  
Suite 7061  
City/State/Zip: Indianapolis, IN 46266  
Office Phone: (317) 266-6508  
Fax #: (317) 266-5568  
e-mail Address: mark.peterson@em.fcncd.com

**PRESIDENT ELECT**

Name: Mark Peterson ✓ 23536  
Company: NBD Bank  
Address: One Indiana Square  
Suite 7061  
City/State/Zip: Indianapolis, IN 46266  
Office Phone: (317) 266-6508  
Fax #: (317) 266-5568  
E-mail Address: mark.peterson@em.fcncd.com

**TREASURER**

Name: Douglas Ehlen, CPA ✓  
Company: Ehlen Heldman & Company  
Address: 130 Eler Avenue  
City/State/Zip: Indianapolis, IN 46227  
Office Phone: (317) 786-8001  
Fax #: (317) 786-8030  
E-mail Address: dbexyz@AOL.com

**PROGRAM VICE PRESIDENT**

Name: Rhoda Israelov, CFP, CLU ✓  
Company: Smith Barney  
Address: 111 Monument Circle  
Suite 310  
City/State/Zip: Indianapolis, IN 46204  
Office Phone: (317) 634-8000  
Fax #: (317) 237-6417  
e-mail Address: \_\_\_\_\_



**VP PUBLIC RELATIONS**

Name: Chris Hirschfeld 70451 ✓  
Company: Lincoln Financial Advisors ✓  
Address: 11595 N. Meridian Street  
Suite 800  
City/State/Zip: Carmel, IN 46032  
Office Phone: (317) 573-65410  
Fax #: (317) 573-6502  
e-mail Address: cchirschfeld@LNC.com

**ETHICS VICE PRESIDENT**

Name: Jeffrey D. Heck ✓  
Company: Robinson Heck  
Address: 47 South Meridian Street  
3<sup>rd</sup> Floor Majestic Building  
City/State/Zip: Indianapolis, IN 46204  
Office Phone: (317) 261-9084  
Fax #: (317) 236-6455  
e-mail Address: Jeffheck@robinsonheck.com

**DIRECTOR -VP PUBLICATIONS**

Name: Tom Ward, CFP, JD 47696 ✓  
Company: American Express  
Address: 9200 Keystone Crossing  
Suite 100  
City/State/Zip: Indianapolis, IN 46240  
Office Phone: (317) x-210  
Fax #: (317) 574-3346  
e-mail Address: tward11235@aol.com

**EDUCATION VICE PRESIDENT**

Name: Mark Cade ✓  
Company: Cade Group, Inc.  
Address: 581 S. Rangeline Road  
Suite 2  
City/State/Zip: Carmel, IN 46032  
Office Phone: (317) 848-7108  
Fax #: (317) 848-7108  
e-mail Address: cadgrpinc@aol.com

**GOVERNMENT AFFAIRS LIAISON**

Name: Jeffrey D. Heck ✓  
Company: Robinson Heck  
Address: 47 South Meridian Street  
3<sup>rd</sup> Floor Majestic Building  
City/State/Zip: Indianapolis, IN 46204  
Office Phone: (317) 261-9084  
Fax #: (317) 236-6455  
e-mail Address: Jeffheck@robinsonheck.com

**DIRECTOR, PAST-PRESIDENT** ✓

Name: Deborah Pownall, CFP  
Company: Financial Network  
Address: 5348 West Vermont Street  
Suite 100  
City/State/Zip: Indianapolis, IN 46224  
Office Phone: (317) 243-8016  
Fax #: (317) 243-3169  
e-mail Address: dmp67@aol.com

**DIRECTOR, VP MONEY WISE SYMPOSIUM**

Name: Bart Pyle, CFP 36390 ✓

Company: \_\_\_\_\_

Address: 5757 Riverwood Drive  
\_\_\_\_\_

City/State/Zip: Indianapolis, IN 46250

Office Phone: (317) 808-7169

Fax #: (317) 955-2538

e-mail Address: \_\_\_\_\_

**CHAPTER/REGIONAL SYMPOSIUM DATA**  
**and**  
**PUBLIC EVENT (PLANNING PAYS OFF!)**

The information requested below is provided to our Corporate and Broker/Dealer members for use in determining their exhibit schedules for the upcoming year as well as the "IAFF Calendar of Events." Don't miss this opportunity to promote your event(s)! Your event(s) date(s) will be included in IAFF's Calendar of Events which is accessed by both members & potential exhibitors through IAFF's "Fax on Demand," "IAFF INTERACTIVE" and *Planning Matters*.

- CHAPTER NAME: Indianapolis Chapter
- CONFERENCE/EVENT TITLE: Money Wise '98
- 1998/1999 DATES: Cancelled, to Reschedule in 1999
- # OF DAYS: One
- OPEN TO PUBLIC: Yes: x No:
- # OF YEARS HELD: 1<sup>st</sup> Year
- # OF EXHIBITORS EXPECTED: 40 PREVIOUS YEAR: N/A
- EXHIBITOR FEES: \$300/\$350
- # OF ATTENDEES EXPECTED: 1000+ PREVIOUS YEAR: N/A

CONTACT NAME: Len Neisler or Bart Pyle

PHONE: (317) 726-2530 or (317) 634-4400

E-MAIL ADDRESS: NeislerL@compuserve.com

COMMENTS: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Rec'd 5/12/97

IAFP  
Officer Fact Sheet  
1997-1998  
Positions Effective 7-1-97

**Indianapolis Chapter**

Submitted by: Deborah M Pownall, CFP      President  
Submitted on 5-5-97      Election Date: 4-4-97

**Chapter Administrator**

Kim B. Stoneking      office phone      317-844-6268      not dedicated IAFP line  
ISALU      fax      317-844-7659  
3009 E 96<sup>th</sup> St.  
Indianapolis, IN 46240

Board of Directors meet at summer planning retreat and before each of the 5 C.E. meetings.  
Chapter meetings generally in September, November, January, March and May

**Recipient of Monthly Membership Package**

Bradley John Henthorn, CFP      Membership Chair  
Henthorn Agency      office phone      317-787-9489  
411 Main St.      fax      317-787-9480  
Beech Grove, IN 46107

**Recipient of Monthly Membership Package**

Barton Jay Pyle, CFP      Treasurer      36390  
City Securities Corp.      office phone      317-972-7169  
135 N Pennsylvania St. #2200      fax      317-972-7144  
Indianapolis, IN 46204      e-mail      bpyle@citysecurities.com

**President**

Deborah Myers Pownall, CFP  
Financial Network Investment Corp.      office phone      317-243-8016      41881  
5348 West Vermont St. #100      fax      317-243-3169  
Indianapolis, IN 46224      e-mail      DMP67@aol.com

**President Elect** to be determined at summer retreat July 11 and 12, 1997

**Secretary**

Mark Peterson      office phone      317-266-6508  
NBD Bank, NA      fax      317-266-5568  
One Indiana Square, Suite 102      e-mail      mark-peterson@em.fcndb.com  
Indianapolis, IN 46266

**Treasurer**

Barton J Pyle, CFP  
City Securities Corp.      office phone      317-972-7169  
135 N Pennsylvania St. #2200      fax      317-972-7144  
Indianapolis, IN 46204      e-mail      bpyle@citysecurities.com

IAFP Indianapolis Chapter page 2  
Officer Fact Sheet  
1997-1998  
Positions Effective 7-1-97

**Newsletter Editor**

Tom Ward, CFP, JD  
American Express Financial  
Financial 11235 Fonthill Dr.  
Indianapolis, In 46236

office phone 317-844-6441  
fax 317-574-3346

**Membership Vice President**

Bradley J. Henthorn, CFP  
Henthorn Agency  
411 Main St.  
Beech Grove, IN 46107

office phone 317-787-9489  
fax 317-787-9480

**Program Vice President**

Rhoda Israelov, CFP, CLU, MS  
Smith Barney  
111 Monument Circle Suite 300  
Indianapolis, IN 46250

office phone 317-237-6435  
fax 317-237-6417  
e-mail

43787

**Public Relations Vice President / Mastering Money Champion**

Elaine Bedel, CFP, MBA  
Bedel Financial Consulting, Inc.  
9190 Priority Way West Dr. Suite 120  
Indianapolis, IN 46240

office phone 317-843-1358  
fax 317-574-5999  
e-mail bedel@indy.net

**Education Vice President**

Leonard L. Neisler  
The Financial Group, Inc.  
P.O. Box 525  
Carmel, IN 46032-0525

office phone 317-573-6543  
fax 317-237-6417  
e-mail

62944

**Ethics Vice President**

none

**Regulatory Vice President**

Richard Randall, Attorney  
10333 N Meridian St., Suite 375  
Indianapolis, IN 46290

office phone 317-574-9911  
fax 317-574-9922  
e-mail

46103

No other Directors at this time

**IAFP**  
**INDIANAPOLIS CHAPTER**

**OFFICERS & BOARD FOR 1996-1997**

These members have been elected to serve as officers and directors for the next chapter year (July '96 through July '97).  
Each of them has accepted and committed to serve.

---

PRESIDENT: Robert Abernathy, CFP  
317-293-9100 fax 317-293-9182

SECRETARY: Leonard Neisler  
317-573-6543 fax 317-573-6544

TREASURER: Deborah Pownall, CFP  
317-255-5770 fax 317-243-3169

These elected officers are automatically members of the board of directors.

---

CHAIRMAN: Barton Pyle, CFP  
317-634-4400 fax 317-972-7144

BOARD MEMBER: Bradley Henthorn, CFP  
317-787-9489 fax 317-787-9480

BOARD MEMBER: Elaine Bedel, CFP, MBA  
317-843-1358 fax 317-574-5999

BOARD MEMBER: Rhoda Israelov, CFP, CLU, MS  
317-634-8000 fax 317-237-6417

BOARD MEMBER: Tom Ward, CFP, JD  
317-844-6441 fax 317-~~826-9528~~

ADMV. —

Kim STONEKUNG  
844-6268

fax 844-7659

574-3346

## COMMITTEES and APPOINTED POSITIONS

Each member has committed to serve in the following positions.

REGULATORY COORDINATOR:	Richard Randall, Atty
VICE PRESIDENT, MEMBERSHIP:	Bradley Henthorn, CFP
VICE PRESIDENT, PROGRAMS/EDUCATION:	Barton Pyle, CFP
VICE PRESIDENT, PUBLIC RELATIONS:	Elaine Bedel, CFP, MBA
VICE PRESIDENT, PUBLICATIONS:	Tom Ward, CFP, JD

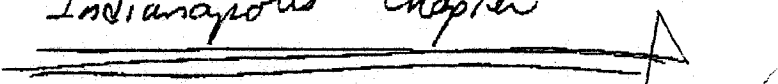
### COMMITTEES

NEWSLETTER:	Tom Ward, Chair Rob Abernathy
MEETING ADMINISTRATION:	Bill Scherer, Chair
Registration	Rick Randall (J. Hearst)
Room setup	Janet Creek
Refreshments	Susan Woods
Name Badges	Deborah Pownall
AV Equipment	
PROGRAMS/EDUCATION:	Bart Pyle, Chair
	Joe Clark
	Kris Fruehwald
	Rhoda Israelov
	Josette Rathbun
PUBLIC RELATIONS:	Elaine Bedel, Chair
	John Guy
	Janette Koon
MEMBERSHIP:	Brad Henthorn, Chair
	Mark Light
	Natalie Vaswani
	Len Neisler

93/1996 Officers & Directors  
Indianapolis Chapter

A

President  
Barton Pyle, CFP  
Whipple & Co.  
317-469-7776



B J

Membership Vice President  
Rob S. Abernathy, CFP  
Waddell & Reed, Inc.  
317-293-9100

→ Please mail the "monthly" packet here.

S

Secretary  
Charles Sherman, CFP  
G.L. Pittsford & Associates  
317-849-9559

T K

Treasurer  
Deborah Pownall, CFP  
Financial Network Invest. Corp.  
317-255-5770

→ Please mail the "checks" here.

Z

Board Members  
Bettina Benedict, CFP, Chairman  
Financial Freedom  
317-638-1313

X

Kim Stoneking, CAE  
ISALU  
317-844-6268

Z

Mark Peterson  
NBD Bank, N.A.  
317-266-6508

Z

Kristin Fruehwald  
Barnes & Thornburg  
317-638-1313

Z

Debora Bennett, CFP  
Oxford Financial Advisors  
317-843-5678

Z

Rhoda Israelov, CFP  
Smith Barney  
317-634-8000

Z

Susan Woods, CFP  
Dartmouth Training Group  
317-573-4844

Z

John Guy, CFP  
Dean Whitter Reynolds  
317-843-5021

Jackie,  
Here's the list.  
Rob



SENT BY: JAPP

8-29-94 10:36AM

Admin - Kim IAFP

# 3

Programs - Bart Pyle

Mo Mail - Kim

Mo Reimb - Debbie Bennett

To: Denise  
From: Kim Stoneking  
Indianapolis

BOARD OF DIRECTORS  
1994 - 1995  
Effective 7/1/1994

PRESIDENT

Name: BETTINA BENEDICT, MBA, CFP

Company FINANCIAL FREEDOM INC.

Address: 180 1/2 S. MAIN ST.

ZIONSVILLE, IN 46077

City/State/Zip: \_\_\_\_\_

Office Phone: 317-873-9930

FAX# Same #

# years on chapter board (2)

SECRETARY

Name: \_\_\_\_\_

Company \_\_\_\_\_

Address: \_\_\_\_\_

City/State/Zip: \_\_\_\_\_

Office Phone: \_\_\_\_\_

FAX# \_\_\_\_\_

# years on chapter board ( )

MEMBERSHIP VICE PRESIDENT

Name: Becky Dentart

Company: Lucas i Dentart

Address: 9000 Keystone Cross, Nc

INDIANAPOLIS, IN 46240

City/State/Zip: \_\_\_\_\_

Office Phone: 317-848-1261

PRESIDENT-ELECT

Name BART PYLE, CFP

Company DEERFIELD FINANCIAL ADVISORS INC.

Address: 8425 WOODFIELD CROSSING BLD.

INDIANAPOLIS, IN 46240

City/State/Zip: \_\_\_\_\_

Office Phone: 317-469-3930

FAX# 317-469-9808

# years on chapter board (3)

TREASURER

Name: DEBORAH BENNETT, CFP

Company OXFORD FINANCIAL ADVISORS

Address: 11711 N. MERIDIAN ST.

INDIANAPOLIS, IN P.O. <sup>516 600</sup> 50238

City/State/Zip: 46280-0238

Office Phone: 317-843-5678

FAX# \_\_\_\_\_

# years on chapter board (4)

PROGRAMS VICE PRESIDENT

Name: See last page

Company: \_\_\_\_\_

Address: \_\_\_\_\_

City/State/Zip: \_\_\_\_\_

Office Phone: \_\_\_\_\_

~~1.1 - 0.12.12~~  
# years on chapter board

FAX#

(2) # years on chapter board ( )

(over)

SENT BY: IAFF

8-29-94 10:37AM

IAFF

# 0

*Programming* **DIRECTORS**  
 1994 - 1995  
 Effective 7/1/1994

Name: Rhoda Israelov, CFP

Company: Smith Barney Stearns

Address: 201 N. Illinois St.  
INDIANAPOLIS, IN 46204

City/State/Zip: \_\_\_\_\_

Office Phone: 317-237-3055

Assigned Task or Title \_\_\_\_\_

# years on chapter board (5)

Name Rob Abernathy, CFP

Company: Waddell Reed

Address: 2780 Waterfront Pkwy E. Dr.  
INDIANAPOLIS, IN 46214

City/State/Zip: 3

Office Phone: 317-293-9100

Assigned Task or Title \_\_\_\_\_

# years on chapter board (New)

Name Deborah Pownall, CFP

Company: Financial Network Advisory Co.

Address 5342 W. Vermont St.  
INDIANAPOLIS, IN 46224

City/State/Zip: \_\_\_\_\_

Office Phone: 317-255-5770

Assigned Task or Title \_\_\_\_\_

# years on chapter board (New)

Name: Chuck Swarmin

Company: G. L. Pittsford Assoc., Inc.

Address: 8335 Allison Pointe Trail  
INDIANAPOLIS, IN 46250

City/State/Zip: \_\_\_\_\_

Office Phone: 317-849-9559

Assigned Task or Title \_\_\_\_\_

# years on chapter board (5)

(OVER)

Post-it™ brand fax transmittal memo 7671 # of pages ▶ 6

To: <u>C. MITZEL</u>	From: <u>TDAF</u>
Co.	Co.
Dept: <u>317 848 3005</u>	Phone # <u>4274</u>
Fax # <u>317 844 9614</u>	Fax #

IAFP

FACT SHEET  
194 - 1995

POSITIONS EFFECTIVE 7/1/1994

(Please verify that all chapter officers are IAFF members)  
TYPE OR PRINT ONLY

Chapter Name: Indianapolis

Submitted By: \_\_\_\_\_ Title: \_\_\_\_\_

Date Submitted: 6-20-94 Date Election Held: June 1994

CHAPTER ADMINISTRATOR

Full-time \_\_\_\_\_ Part-time

Full Name: Mr Kim Stoneking

Company: 3009 E. 96th St

Address: Indianapolis IN 46240

City/State/Zip \_\_\_\_\_

Office Phone: (317) 844 6268

Fax Number: (317) 844 7659

Alternate Address if P.O. Box (UPS)

None

Board of Directors Meeting Schedule: bi-monthly or as needed  
Meet twice 2 month from July - September

Chapter Monthly Meeting Schedule; i.e., every 3rd Thursday  
Quarterly CEU

(over)



**MEMO TO:** Chapter Presidents  
Chapter Administrators

**FROM:** Denise Topf  
Chapter Services Coordinator

**DATE:** June 16, 1994

**SUBJECT:** 1994-95 Chapter Officer Submission Drawing

This is a reminder that time is rapidly approaching for your 1994-95 Officer Fact Sheet submission deadline. To qualify for the "FREE" convention drawing, we must receive your new officer slate no later than July 1. The drawing rules are listed below:

- o Fact sheets due by July 1
- o Chapters who submit their fact sheets by July 1, will be eligible for a FREE convention drawing
- o The drawing will be held July 8
- o The winning chapter can use the FREE registration for a raffle, to give to an outgoing/incoming president, etc.

By submitting the chapter officer listing in a timely manner, you can be sure your incoming officers can qualify for the chapter officer discounted rate to attend the Boston Success Forum, as well as, receiving the information and materials they need to do their job, i.e., monthly reimbursement checks, monthly membership packages etc. without any delays in the process.

If you have misplaced your fact sheet, please give me a call. I'll be happy to mail or fax you another set. I can be reached at (800) 945-4237 ext. 7766.

*Rob Alamy, CAP* } *293-9100*

*...* } *504-2-Ver...*  
*#100*



**RECIPIENT OF MONTHLY MAIL PACKAGE**  
(member rosters, labels, statistical reports etc.)

Title: Chapter Administrator

Full Name: \_\_\_\_\_

Company: (see previous page)

Address: \_\_\_\_\_

City/State/Zip: \_\_\_\_\_

Office Phone: (     ) \_\_\_\_\_

FAX#(     ) \_\_\_\_\_

**RECIPIENT OF MONTHLY REIMBURSEMENT CHECK**  
(chapter reimbursement w/ deductions)

Title: Debbie Bennett, CFP

Full Name: Treasurer of Indianapolis Chapter

Company: Banc One     PO Box 7700

Address: 111 Monument Circle #1711

Indianapolis IN     46277-0117

City/State/Zip: \_\_\_\_\_

Office Phone: (317) 321-3056

FAX#(317) 321-3571

BOARD OF DIRECTORS  
1994 - 1995  
Effective 7/1/1994

PRESIDENT

Name: Bettine Benedict MBA, CFP  
Company Financial Freedom, Inc  
Address 180 1/2 S. Main St  
Zionsville IN 46077  
City/State/Zip: \_\_\_\_\_  
Office Phone: 317 873 9930  
FAX# \_\_\_\_\_  
# years on chapter board ( 1 )

PRESIDENT-ELECT

Name Bert Ryle, CFP  
Company Deerfield Financial Advisors  
Address: 8425 Woodfield Cross Blvd  
Suite 202 West  
City/State/Zip: Indianapolis IN 46244  
Office Phone: 317 469 3930  
FAX# 317 469 9808  
# years on chapter board ( 1 )

SECRETARY

Name: Deborah Pownall, CFP  
Company 5342 W Vermont #100  
Address: Indianapolis IN  
46224  
City/State/Zip: \_\_\_\_\_  
Office Phone: \_\_\_\_\_  
FAX# \_\_\_\_\_  
# years on chapter board ( )

TREASURER

Name: Debbie Bennett CFP  
Company [see previous page]  
Address: \_\_\_\_\_  
City/State/Zip: \_\_\_\_\_  
Office Phone: \_\_\_\_\_  
FAX# \_\_\_\_\_  
# years on chapter board ( 4 )

MEMBERSHIP VICE PRESIDENT

Name: Rob S. Abernathy, CFP  
Company: Waddell & Reed  
Address: 2780 Westfront Pkwy  
# 215  
City/State/Zip: Indianapolis IN 46214  
Office Phone: 317 293 9100  
FAX# \_\_\_\_\_  
# years on chapter board ( 0 )

PROGRAMS VICE PRESIDENT

Name: \_\_\_\_\_  
Company: \_\_\_\_\_  
Address: \_\_\_\_\_  
City/State/Zip: \_\_\_\_\_  
Office Phone: \_\_\_\_\_  
FAX# \_\_\_\_\_  
# years on chapter board ( )

(over)

BOARD OF DIRECTORS  
1994 - 1995  
Effective 7/1/1994

PUBLIC RELATIONS

*Mail to*  
*Kim Stoneking*

Name: \_\_\_\_\_

Company: \_\_\_\_\_

Address \_\_\_\_\_

City/State/Zip \_\_\_\_\_

Office Phone: \_\_\_\_\_

FAX# \_\_\_\_\_

# years on chapter board ( )

ETHICS VICE PRESIDENT

Name \_\_\_\_\_

Company \_\_\_\_\_

Address \_\_\_\_\_

City/State/Zip \_\_\_\_\_

Office Phone: \_\_\_\_\_

FAX# \_\_\_\_\_

# years on chapter board ( )

EDUCATION VICE PRESIDENT

Name: \_\_\_\_\_

Company: \_\_\_\_\_

Address: \_\_\_\_\_

City/State/Zip: \_\_\_\_\_

Office Phone: \_\_\_\_\_

FAX# \_\_\_\_\_

# years on chapter board ( )

REGISTRY COORDINATOR

*Mail to*  
*Kim Stoneking*

Name \_\_\_\_\_

Company \_\_\_\_\_

Address \_\_\_\_\_

City/State/Zip: \_\_\_\_\_

Office Phone: ( ) \_\_\_\_\_

FAX# \_\_\_\_\_

# years on chapter board ( )

REGULATORY/LEGISLATIVE COORDINATOR

Name: *Richard Randell*

Company: \_\_\_\_\_

Address: *10293 N Meridian #175*  
*Indianapolis IN 46290*

City/State/Zip: \_\_\_\_\_

Office Phone: *317 574 9911*

FAX# *574 9922*

# years on chapter board ( *3* )

*317*

(over)



DIRECTORS  
1994 - 1995  
Effective 7/1/1994

Name: Channing F Mitchell CFP  
Company: Windsor Group, Ltd.  
Address: 10291 W Meridian #300  
Indianapolis IN 46290  
City/State/Zip: \_\_\_\_\_  
Office Phone: 317 848 3005

Name: Chuck Shoorman, CFP  
Company: G.L. Pittsford & Associates  
Address: 8335 Allison Pointe Trail #190  
Indianapolis IN 46250-1685  
City/State/Zip: \_\_\_\_\_  
Office Phone: 317 849 9559

Assigned Task or Title  
"Chairman"  
# years on chapter board (4)

Assigned Task or Title  
# years on chapter board (5)

Name: \_\_\_\_\_  
Company: \_\_\_\_\_  
Address: \_\_\_\_\_  
\_\_\_\_\_  
City/State/Zip: \_\_\_\_\_  
Office Phone: \_\_\_\_\_  
Assigned Task or Title  
# years on chapter board ( )

Name: \_\_\_\_\_  
Company: \_\_\_\_\_  
Address: \_\_\_\_\_  
\_\_\_\_\_  
City/State/Zip: \_\_\_\_\_  
Office Phone: \_\_\_\_\_  
Assigned Task or Title  
# years on chapter board ( )

(OVER)



IAFP

OFFICER FACT SHEET  
1993 - 1994  
POSITIONS EFFECTIVE 7/1/1993

(Please verify that all chapter officers are IAFP members)  
TYPE OR PRINT ONLY

Chapter Name: Indianapolis chapter

Submitted By: "Chap" Mitchell Title: President

Date Submitted: July 31 Date Election Held: June

CHAPTER ADMINISTRATOR

Full-time \_\_\_\_\_ Part-time

Full Name: Kim Stoneking

Company: % IAFP, Indianapolis chapter

Address: 3009 E 96th

Indianapolis IN 46240

City/State/Zip \_\_\_\_\_

Office Phone: (317) 844-6268

Fax Number: (317) 844-7659

Alternate Address if P.O. Box (UPS)

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Board of Directors Meeting Schedule: once 2 month

Chapter Monthly Meeting Schedule; i.e., every 3rd Thursday

4 - 4 hour C.E. Meetings  
(over) Oct, Dec, Feb, April

OFFFACT/CHAPTER

BOARD OF DIRECTORS  
1993 - 1994  
Effective 7/1/1993

**PRESIDENT**

*Re-elected*

Name: Channing Mitchell CFP  
Company Windsor Group Ltd  
Address 10291 N Meridian #300  
Indianapolis IN 46290  
City/State/Zip: \_\_\_\_\_

Office Phone: 317 848 3005  
FAX# 317 844 9614  
# years on chapter board (4)

**SECRETARY**

*Brought back to life*

Name: Chuck Sheerman, CFP  
Company G.L. Pittsford & Assoc  
Address: 8335 Allison Pointe Trail  
#190  
City/State/Zip: Indianapolis  
46250  
Office Phone: 317 849-9559  
FAX# \_\_\_\_\_  
# years on chapter board (4)

**PRESIDENT-ELECT**

Name Bert Ryle, CFP *Advisor*  
Company Deerfield Financial Crossing  
Address: 8425 Woodfield Blvd #2024  
Indianapolis, IN 46240  
City/State/Zip: \_\_\_\_\_

Office Phone: (317) 469-3930  
FAX# \_\_\_\_\_  
# years on chapter board (0)

**TREASURER**

*Re-elected*

Name: Debbie Bennett, CFP  
Company (see previous)  
Address: \_\_\_\_\_  
City/State/Zip: \_\_\_\_\_  
Office Phone: \_\_\_\_\_  
FAX# \_\_\_\_\_  
# years on chapter board (3)

**MEMBERSHIP VICE PRESIDENT**

Name: Bethune Benedict, MBA, CFP  
Company: Financial Freedom, Inc  
Address: 180 1/2 S. Main St  
Zionsville IN 46099  
City/State/Zip: \_\_\_\_\_  
Office Phone: \_\_\_\_\_  
FAX# \_\_\_\_\_  
# years on chapter board (0)

**PROGRAMS VICE PRESIDENT**

Name: Becky DeHart, CPA  
Company: Luigs & DeHart  
Address: 9000 Keystone Crossing #755  
City/State/Zip: Indianapolis 46240  
Office Phone: 317 848-1261  
FAX# \_\_\_\_\_  
# years on chapter board (0)

(over)

**DIRECTORS**  
1993 - 1994  
Effective 7/1/1993

Name: \_\_\_\_\_

Name \_\_\_\_\_

Company: \_\_\_\_\_

Company: \_\_\_\_\_

Address: \_\_\_\_\_

Address: \_\_\_\_\_

City/State/Zip: \_\_\_\_\_

City/State/Zip: \_\_\_\_\_

Office Phone: \_\_\_\_\_

Office Phone: \_\_\_\_\_

Assigned Task or Title

Assigned Task or Title

# years on chapter board ( )

# years on chapter board ( )

Name \_\_\_\_\_

Name: \_\_\_\_\_

Company: \_\_\_\_\_

Company: \_\_\_\_\_

Address \_\_\_\_\_

Address: \_\_\_\_\_

City/State/Zip: \_\_\_\_\_

City/State/Zip: \_\_\_\_\_

Office Phone: \_\_\_\_\_

Office Phone: \_\_\_\_\_

Assigned Task or Title

Assigned Task or Title

# years on chapter board ( )

# years on chapter board ( )

(over)

*Denise*

**"TEAM IAFP" INDIANAPOLIS CHAPTER  
1992 - 1993 OFFICERS & DIRECTORS**

President . . . . . Channing Mitchell, CFP  
Windsor Group, Ltd.  
10291 N. Meridian, Suite 300  
Indianapolis, IN 46290  
848-3005; FAX: 844-9614

President-Elect and  
Executive Vice President . . . . . Open

Treasurer . . . . . Debora Bennett, CFP  
Bank One, Indianapolis NA  
Bank One Tower #1711  
Indianapolis, IN 46277  
321-3056; FAX: 321-3516  
Checks + Statements

Secretary . . . . . Judy Knafel, CFP  
INB National Bank  
151 N. Delaware, #M1010  
Indianapolis, IN 46266  
266-6584; FAX: 266-6567

**Programs/Symposium/Open Forums :**

Practitioner Division . . . Elaine Bedel, CFP  
9135 N. Meridian #B3  
Indianapolis, IN 46260  
843-1358; FAX: 843-0961

Broker/Dealer Division . . . Rhoda Israelov, CFP, CLU  
Shearson Lehman Hutton  
201 N. Illinois, Suite 400  
Indianapolis, IN 46204  
237-3055; FAX: 237-3111  
V.M. 685-4246

General &  
Insurance Division . . . . . Frank Hoffman, JD  
Krieg, DeVault, Alexander  
& Capehart  
2800 INB Tower  
Indianapolis, IN 46204  
263-9111

Membership . . . . . Teresa Woolley  
Long Term Care Associates  
124 E. Carmel Drive  
Carmel, IN 46032  
844-1002; FAX: 844-2672

*ACT  
1/1/92*

- Sponsors . . . . . Wes Rude  
Principal Financial Group  
11555 N. Meridian, #300  
Carmel, IN 46032  
573-6556; FAX: 573-6550
  
- Newsletter . . . . . Ted Christofolis, CFP, CPA, APFS  
Windsor Group, Ltd.  
10291 N. Meridian, Suite 300  
Indianapolis, IN 46250  
848-3005; FAX: 844-9614
  
- Continuing Education . . . . . Susan Woods, CFP  
Dartmouth Training Group, Ltd.  
10333 N. Meridian, Suite 230  
Indianapolis, IN 46290  
573-4844; FAX: 573-4840  
V.M. 466-2998
  
- National Liaison . . . . . John Guy, CFP  
Dean Witter Reynolds  
11611 N. Meridian  
Carmel, IN 46032  
843-5021; FAX: 843-5469
  
- Ethics/Registry Liaison . . . . . Charles T. Shearman, CFP  
G.L. Pittsford & Assoc. Inc.  
8335 Allison Pointe Trail #190  
Indianapolis, IN 46250  
849-9559; FAX: 577-8575
  
- Regulatory Liaison . . . . . Richard Randall, CFP, JD  
Attorney at Law  
10291 N. Meridian, Suite 125  
Indianapolis, IN 46290  
574-5911
  
- Chapter Administrator . . . . . Kim Stoneking  
Monthly Membership  
c/o IAFF, Indianapolis Chapter  
3009 E. 96th  
Indianapolis, IN 46240  
844-6268 FAX: 844-7659
  
- Public Education Liaison . . . . . Open
  
- ICFP Liaison . . . . . William Conner, CFP  
c/o Conner & Endris  
5410 Castleway Drive  
Indianapolis, IN 46250  
577-5647

MA



1991 - 1992 I. A. F. P. BOARD MEMBERS  
INDIANAPOLIS CHAPTER

President..... Charles T. Shearman, CFP ✓  
G.L. Pittsford & Associates, Inc.  
8335 Allison Pointe Trail, Suite 190  
Indianapolis, Indiana 46250-1685  
(317) 849-9559 Fax (317) 577-8575

President Elect..... Channing F. Mitzell, CFP ✓  
The Windsor Group, Ltd.  
10291 North Meridian Street, Suite 300  
Indianapolis, Indiana 46290  
(317) 848-3005 Fax (317) 844-9614

Programs V.P. .... Rhoda Israelov, CFP, CLU ✓  
Shearson, Lehman, Hutton  
201 North Illinois, Suite 400  
Indianapolis, Indiana 46204  
(317) 237-3055 Fax (317) 634-6398

Programs V.P. .... Richard A. Jones, M.B.A., J.D.  
101 West Ohio Street, Suite 1990  
Indianapolis, Indiana 46204  
(317) 684-3553 Fax (317) 684-3525

New Membership V.P. .... Douglas R. Sweet, CFP ✓  
Pacific Mutual  
8330 Woodfield Crossing, Suite 340  
Indianapolis, Indiana 46240  
(317) 469-1077 Fax (317) 469-6350

New Membership Co V.P. .... Judy L. Knafel, CFP ✓  
INB National Bank  
151 North Delaware, Suite 1010  
Indianapolis, Indiana 46266  
(317) 266-6584 Fax (317) 266-6567

Existing Membership V.P. .. Brian G. Latinovich ✓  
Rushing Financial Group  
3755 East 82nd Street, Suite 260  
Indianapolis, Indiana 46240  
(317) 578-2740 Fax (317) 578-7837

Publications V.P. .... Brenda L. Coryell ✓  
The Windsor Group, Ltd.  
10291 North Meridian Street, Suite 300  
Indianapolis, Indiana 46290  
(317) 848-3005 Fax (317) 844-9614

Symposium V.P. .... Susan Mills, CFP ✓  
284 Sunset Blvd.  
Greenwood, Indiana 46142  
(317) 882-4038

- NOT MBR

*ditto*  
*per Charles 8/18/91*

- NOT MBR

*ditto*

( "L" )

**BOARD OF DIRECTORS**

**PRESIDENT**

Name: Susan Mills, CFP

Company: Unified Management Corp

Address: 429 N. Pennsylvania

City/State/ZIP: Indianapolis, IN 46204

Office Phone: ( 317-684-3300

**PRESIDENT-ELECT \_\_\_ EXECUTIVE VP \_\_\_ (Check)**

Full Name: \_\_\_\_\_

Company: \_\_\_\_\_

Address: \_\_\_\_\_

City/State/ZIP: \_\_\_\_\_

Office Phone: ( )

**SECRETARY**

Full Name: Shelly Willingham

Company: G.L. Pittsford & Assoc.

Address: 6081 E. 82nd Street,

Suite 112

City/State/ZIP: Indianapolis, IN 46250

Office Phone: ( 317 ) 849-9559

**TREASURER**

Full Name: David E. Weaver

Company: Dave Weaver Agency

Address: 581 S. Range Line Road #B-4

City/State/ZIP: Carmel, IN 46032

Office Phone: ( 317 ) 844-7020

**MEMBERSHIP VICE PRESIDENT**

Full Name: G. Kent Jacobs

Company: \_\_\_\_\_

Address: 9240 N. Meridian

Suite 370

City/State/ZIP: Indianapolis, IN 46260

Office Phone: ( 317 ) 848-2367

**PROGRAMS VICE PRESIDENT**

Full Name: James A. Boggs, CLU ChFC

Company: Jim Boggs & Associates

Address: P.O. Box 756

City/State/ZIP: Greenwood, IN 46142

Office Phone: ( 317 ) 888-6801



*Deltra*

Treasurer..... *Deltra* *✓*  
D. A. Bennett, CFP  
Bank One, Indianapolis N.A.  
4822 North Central  
Indianapolis, Indiana 46205  
(317) 231-3056 Fax (317) 321-3516

National Liaison..... Elaine Bedel, CFP *✓*  
Bedel Financial Consulting  
8911 Dandy Creek Drive  
Indianapolis, Indiana 46234  
(317) 293-6676

Regulatory Liaison..... Richard Randall, JD, CFP, ChFC *✓*  
10291 North Meridian Street, Suite 125  
Indianapolis, Indiana 46290  
(317) 574-9911 Fax (317) 844-9614

Ethics..... Shelly Willingham *✓*  
G.L. Pittsford & Associates, Inc.  
8335 Allison Pointe Trail, Suite 190  
Indianapolis, Indiana 46250-1685  
(317) 849-9559 Fax (317) 577-8575

IAFP/ICFP-Registry..... Channing F. Mitzell, CFP *✓*  
The Windsor Group, Ltd.  
10291 North Meridian Street, Suite 300  
Indianapolis, Indiana 46290  
(317) 848-3005 Fax (317) 844-9614

Public Relations..... Charles T. Shearman, CFP *✓*  
G.L. Pittsford & Associates, Inc.  
8335 Allison Pointe Trail, Suite 190  
Indianapolis, Indiana 46250-1685  
(317) 849-9559 Fax (317) 577-8575

Honorary ICFP ..... Alice J. Clapp, CFP *2*  
Linsco/Private Ledger  
C/O Home Federal Savings Bank  
501 Washington Street  
Columbus, Indiana 47201  
(812) 376-0805

Chapter Administrator..... Kim B. Stoneking *✓*  
Indiana State Association of Life  
Underwriters  
3009 East 96th Street  
Indianapolis, Indiana 46240  
(317) 844-6268 Fax (317) 844-7659

*(X) J K*

**PUBLIC RELATIONS VICE PRESIDENT**

Full Name: Richard L. Randall JD CLU

Company: The Windsor Group

Address: 10291 N. Meridian  
Suite 300

City/State/ZIP: Indianapolis, IN 46290

Office Phone: ( 317 ) 848-3005

**ETHICS VICE PRESIDENT**

Full Name: Carl Grow JD CPA

Company: Coopers & Lybrand

Address: 2900 One American Square

City/State/ZIP: Indianapolis, IN 46282

Office Phone: ( 317 ) 639-4161

**EDUCATION VICE PRESIDENT**

Full Name: James A. Boggs, CLU ChFC

Company: see Program VP

Address: \_\_\_\_\_  
\_\_\_\_\_

City/State/ZIP: \_\_\_\_\_

Office Phone: ( )

**PUBLICATIONS VICE PRESIDENT**

Full Name: Richard L. Randall JD CLU

Company: see Public Relations VP

Address: \_\_\_\_\_  
\_\_\_\_\_

City/State/ZIP: \_\_\_\_\_

Office Phone: ( )

**REGULATORY/LEGISLATIVE COORDINATOR**

Full Name: \_\_\_\_\_

Company: \_\_\_\_\_

Address: \_\_\_\_\_  
\_\_\_\_\_

City/State/ZIP: \_\_\_\_\_

Office Phone: ( )

**REGISTRY COORDINATOR**

Full Name: \_\_\_\_\_

Company: \_\_\_\_\_

Address: \_\_\_\_\_  
\_\_\_\_\_

City/State/ZIP: \_\_\_\_\_

Office Phone: ( )





(066)

7-10-87

I A II B II C II D II E I

- 1 |
- 2 | IAFF BOARD
- 3 | -----
- 4 | ✓
- 5 | Jim Boggs (Treasurer) *9/31 - send Remedy per Carl Grow*
- 6 | Jim Boggs & Associates
- 7 | P.O. Box 756
- 8 | Greenwood, Indiana 46142
- 9 | PH (317) 888-6801
- 10 | ✓
- 11 | Elaine Bedel (VP Programs)
- 12 | Coopers & Lybrand
- 13 | One American Square
- 14 | Suite 2900
- 15 | Indianapolis, Indiana 26282
- 16 | PH (317) 639-4161
- 17 | ✓
- 18 | John Guy
- 19 | Dean, Witter Reynolds
- 20 | 251 North Illinois
- 21 | Suite 1600
- 22 | Indianapolis, Indiana 46204
- 23 | PH (317) 263-5511
- 24 | ✓
- 25 | Carl Grow (President)
- 26 | Coopers & Lybrand
- 27 | One American Square
- 28 | Suite 2900
- 29 | Indianapolis, Indiana 26282
- 30 | PH (317) 639-4161
- 31 | ✓
- 32 | Terry Heath
- 33 | (Chairman-Practice Management Task Force)
- 34 | Hall, Render, Killian, Heath & Lyman
- 35 | One American Square
- 36 | Suite 1100
- 37 | Indianapolis, Indiana 26282
- 38 | PH (317) 633-4884
- 39 | ✓
- 40 | Bill Howell
- 41 | (Chairman-Networking Task Force)
- 42 | Joseph LaRosa & Co.
- 43 | 7 North Meridian
- 44 | Room 800
- 45 | Indianapolis, Indiana 46204
- 46 | PH (317) 634-8777
- 47 | ✓
- 48 | Rhoda Israelov
- 49 | (Chairman-"Indianapolis-On the
- 50 | Forefront of Financial Planning" Task Force
- 51 | E.F. Hutton
- 52 | One American Square
- 53 | Indianapolis, Indiana 46282
- 54 | PH (317) 632-6300
- 55 |

*Yes:*  
*Here's the list*  
*of the Indianapolis*  
*chapter's board*  
*members.*  
*Carl Grow*

58|  
59|  
60|  
61|  
62|  
63|  
64|  
65|  
66| ✓  
67| Jim Keckley  
68| (Chairman-Current Events Task Force)  
69| Bank One  
70| 101 Monument Circle  
71| Suite 1000  
72| Indianapolis, Indiana 46277  
73| PH (317) 639-3131  
74| ✓  
75| Bob Kelly (VP Publications)  
76| The Market Companies  
77| 2625 North Meridian  
78| Suite 370  
79| Indianapolis, Indiana 46260  
80| PH (317) 848-2367  
81| ✓  
82| Moses Ko  
83| (Chairman-National Convention)  
84| MKO & Associates  
85| 2625 North Meridian  
86| Suite 21  
87| Indianapolis, Indiana 46208  
88| PH (317) 926-6688  
89| ✓  
90| Susan Mills  
91| (Chairman-Education Task Force)  
92| Unified Management Company  
93| 20 North Meridian  
94| Suite 600  
95| Indianapolis, Indiana 46204  
96| PH (317) 634-3300  
97| ✓  
98| Dave Weaver (VP Media)  
99| Dave Weaver Agency  
100| 581 South Rangeline Road  
101| Carmel, Indiana 46032  
102| PH (317) 844-7020  
103| ✓  
104| Dr. Flora Williams (VP Membership)  
105| Purdue University  
106| Consumer Science & Retail Dept.  
107| West Lafayette, Indiana 47907  
108| PH (317) 494-8297  
109|  
110|

*Bob Kelly - Expired  
9240 N. Meridian  
S-370*

*- changed  
9/3/57  
← send monthly mailing  
per Carl Snow*

# Member Services

## Customer Relations Department

- Data Communications
- Registry Info.
- Corporate Info.
- Sample BACB & Price List
- Liability Insurance
- Convention Info.
- Career or CFP Info.
- Speak with individual Team Elder
- Message for membership

Date \_\_\_\_\_

added to 2893M  
8/14/87 Ebe

Name Taxes A. Baggs, CLU, RTHU, CHFC, LUTCF, MSFS  
Company Name Indianapolis Chapter (new treasurer)  
Address P.O. Box 756  
City Greenwood State IN zip 46142  
Phone Number (317) 888-6801

Notes We have not been notified that he is new treasurer of Indiana Chapter & was notified to contact Member Services. If any problems call him at above number.

(ASN267)

#066 INDIANAPOLIS CHAPTER

DATE 9/02/86

## PRESIDENT

Carl W. Grow, JD, CPA  
Coopers & Lybrand  
One American Square, #2900  
Indianapolis, IN 46282

(317) 639-4161

## MEMBERSHIP VICE PRESIDENT

Susan Mills, CFP  
Unified Management Corp.  
20 N. Meridian, Suite 600  
Indianapolis, IN 46204

(317) 634-3300

## ETHICS VICE PRESIDENT

R. Mark Rushing  
Crown Associates Of Indiana  
8330 Woodfield Crossing Blvd., Ste. 150  
Indianapolis, IN 46240

(317) 844-6301

## EXECUTIVE VICE PRESIDENT

James D. Keckley  
American Fletcher Nat'l. Bank  
101 Monument Circle, Suite 1000  
Indianapolis, IN 46277

(317) 639-3131

## SECRETARY

R. Michael Fox, Jr.  
Lifeway, Inc.  
6308 Rucker Road, Suite A  
Indianapolis, IN 46220

(317) 253-1402

## TREASURER

Grace M. Worley  
Financial Strategies Company  
8425 Keystone Crossing, #250  
Indianapolis, IN 46240

(317) 257-5825

## DIRECTORS:

Elaine E. Bedel, CFP  
John W. Guy, CFP  
R. Terry Heath  
William M. Howell  
Rhoda Israelov, CFP  
Paul W. Morris, CFP

*Okay  
E. Bedel  
11/10/86*

✓ Regulatory Coordinator

Nicholas Kaiser  
Unified Management  
20 N. Meridian, Suite 600  
Indianapolis, IN 46204  
(317) 634-3300



INTERNATIONAL ASSOCIATION FOR FINANCIAL PLANNING

*Indiana Chapter*

Mission Statement:

- To ensure continuing quality professional education for members.
- To disseminate timely information of activities and events that affect financial planners.
- To provide a forum for professional networking.
- To provide leadership in the financial planning industry.

OFFICERS

*assigned*

Gary Stump  
Vice Pres.  
[Programs]

Susan Mills  
Vice Pres.  
[Membership]

Jim Keckley  
Exec. V.P.  
[Annual Conf.]  
exec.

Carl Grow  
President

Grace Worley  
Treasurer

Moses Ko  
Vice Pres.  
[Publications]

Mike Fox  
Secretary

Mark Rushing  
Vice Pres.  
[Ethics]

- Coordinate membership meetings
- Monitor programs developed by task forces
- Assist in facilities promotion and staffing

- Solicit and process new members
- Follow up on renewals
- Selection of promotion for new members

- Coordinate annual conf.
- Development of action plan to put on conf.
- Nonfor speakers/facilities/programs

- Coordinate overall activities
- Coordinate annual dinner
- Coordinate annual strategic planning & nominating committee retreat

- Preparation of budgets and collections
- Payment of bills
- Monthly reconciliation of bank account

- Coordinate newsletter
- Nonfor materials from task forces
- Seek commercial advertisers on popular subjects

- Preparation of minutes from meetings
- Coordinate agenda for board members

- Process any complaints to National Act as parliamentarian during meeting

Lois Johnson  
Coordinating Manager

- Check mail box regularly
- Forward correspondence & bills to appropriate people
- Serve as clearing-house for information

TASK FORCES

Practice Management  
Paul Norris

- Generate information on better methods to run a practice
- Generate practice materials for 2 newsletters: (Feb./May)
- Provide speakers for 2 membership meetings: (Oct./Apr-11)

Member Education  
William Howell

- Generate education information for dissemination to members
- Generate materials for 2 newsletters: (Sept./March)
- Provide speakers for 2 membership meetings: (Feb./May)

Regulatory Liaison  
Carl Grow

- Monitoring regulatory matters and maintaining contact with other financial planning organizations
- Generate materials for 2 newsletters: (Oct./April)
- Provide speakers for 2 membership meetings: (Sept./March)

Board of Directors

*for Indiana or Indianapolis Chapter whichever way you have listed.*  
J.

Carl W. Grow  
Coopers & Lybrand  
2900 One American Square  
Indianapolis, Indiana 46282  
(317) 639-4161

\* Lois A. Johnson  
Coopers & Lybrand  
2900 One American Square  
Indianapolis, Indiana 46282  
(317) 639-4161

Elaine E. Bedel  
Coopers & Lybrand  
2900 One American Square  
Indianapolis, Indiana 46282  
(317) 639-4161

James D. Keckley  
American Fletcher National Bank  
101 Monument Circle  
Suite 1000  
Indianapolis, Indiana 46277  
(317) 639-3131

~~Mike Flasco  
F & L Group  
9202 North Meridian  
Suite 380  
Indianapolis, Indiana 46260  
(317) 846-4092~~

*not coded 11/24/86 Ebe  
resigned*

Moses Ko  
MKO & Associates  
2625 North Meridian #21  
Indianapolis, Indiana 46208  
(317) 926-6688

R. Michael Fox, Jr.  
Lifeway, Inc.  
6308 Rucker Road  
Suite A  
Indianapolis, Indiana 46220  
(317) 253-1402

Susan Mills  
Unified Management Company  
20 North Meridian  
Suite 600  
Indianapolis, Indiana 46204  
(317) 634-3300

John W. Guy  
Dean, Witter Reynolds  
One Indiana Square  
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Indianapolis, Indiana 46204  
(317) 263-5511

Paul W. Morris  
Morris Group  
8455 Keystone Crossing #210  
Indianapolis, Indiana 46240  
(317) 842-5306

R. Terry Heath  
Hall, Render, Killian,  
Heath & Lyman  
Suite 1100  
One American Square  
Indianapolis, Indiana 46282  
(317) 633-4884

R. Mark Rushing  
Crown Associates of Indiana  
8330 Woodfield Crossing Blvd.  
Suite 150  
Indianapolis, Indiana 46240  
(317) 844-6301

*not member? 11/24/86 Ebe  
resigned*

William M. Howell  
Howell & Associates  
6525 East 82nd Street  
Indianapolis, Indiana 46250  
(317) 845-0023

~~Gary Stump  
Dean, Witter Reynolds  
11611 North Meridian, Suite 110  
Carmel, Indiana 46032  
(317) 848-1501~~

Rhoda Israelov  
E.F. Hutton  
One American Square  
Indianapolis, Indiana 46282  
(317) 632-6300

Grace Worley  
Financial Strategies Company  
8425 Keystone Crossing #250  
Indianapolis, Indiana 46240  
(317) 257-5825

\* Administrative Coordinator

IAFP CHAPTER ADMINISTRATORS

1986-1987

*for Indiana or Indianapolis Chapter whichever way you have listed.*  
L.

Kay McClellan, Administrator  
Alameda County Chapter IAFP  
24449 Second Street  
Hayward, CA 94541  
(415) 538-0187

Barbara Welch, Administrator  
Austin Chapter IAFP  
8228 Summerside Drive  
P. O. Box 26782  
Austin, TX 78759  
(512) 345-7696

Susan Hermes, Administrator  
Baltimore Chapter IAFP  
P. O. Box 4810  
Baltimore, MD 21211  
(301) 366-1203

Virginia Wood, Administrator  
Boston Chapter IAFP  
1357 Washington Street, Suite 5  
West Newton, MA 02165  
(617) 965-8718

Carol J. Hieatt, Administrator  
Central Ohio Chapter IAFP  
921 Chatham Lane, Suite 300  
P. O. Box 21284  
Columbus, OH 43221  
(614) 488-5540  
(614) 451-4245

Judy Wolf, Administrator  
Central New Jersey Chapter IAFP  
P. O. Box 289  
Red Bank, NJ 07701  
(201) 747-4443

Louise Wiedeman, Administrator  
Cincinnati Chapter IAFP  
632 Vine Street, Suite 727  
Cincinnati, OH 45202  
(513) 421-2202

Priscilla A. Johnson, Administrator  
Connecticut Chapter IAFP  
297 Park Road  
Hamden, CT 06511  
(203) 777-4129

Cindy Weaver, Administrator  
Georgia Chapter IAFP  
1640 Powers Ferry Road  
Suite 320, Building 29  
Atlanta, GA 30067  
(404) 951-8410

Margo A. Kuisis, Administrator  
Greater Milwaukee Chapter IAFP  
2720 Menomonee River Parkway  
Milwaukee, WI 53222  
(414) 774-9199

Melanye Wrighton, Administrator  
Greater Phoenix Chapter IAFP  
1775 E. Ocotillo Road  
Phoenix, AZ 85016  
(602) 266-4186

Charlene Craig, Administrator  
Houston Chapter IAFP  
2200 Post Oak Blvd., Suite 709  
Houston, TX 77056  
(713) 960-1046

Lois A. Johnson, Administrator  
Indianapolis Chapter IAFP  
c/o Coopers & Lybrand  
2900 One American Square  
Indianapolis, IN 46282  
(317) 639-46282

*OK in last 2281M*

639-4161

Frank Bistrom, Administrator  
Kansas City Chapter IAFP  
5845 Horton, Suite 201  
Mission, KS 66202  
(913) 262-0174

Susan Sajium, Administrator  
Long Island Chapter IAFP  
207 Sunrise Highway, Suite 2  
P. O. Box 575  
Rockville Centre, NY 11570-0575  
(516) 763-4237

Marilyn Tardiff, Administrator  
Los Angeles County Chapter IAFP  
222 N. Sepulveda, Suite 1326  
El Segundo, CA 90245  
(213) 615-3111

Purdue University's  
Collegiate Financial Planners

BYLAWS

Article 1

NAME AND LOCATION

Section 1. Name: The name of this organization shall be "Purdue University's Collegiate Financial Planners" (hereafter, the "PCFP"). The PCFP is a student organization formed in accordance with the rules and regulations of Purdue University and the International Association of Financial Planners (IAFP).  
*KVA* *INB*

Section 2. Location: The PCFP is located at Purdue University in West Lafayette, Indiana.

Article 2

PURPOSES AND OBJECTIVES

The purpose of the PCFP is to enhance the students education at Purdue University. The PCFP's objectives to accomplish this goal are as follows:

- 1) To inform the students majoring in Financial Planning of current and future events that could affect their school, major, course load, and or the students individually.
- 2) To inform the students Majoring in Financial Planning of past, present, and future industry events through the IAFP and their literature.
- 3) To enable the students majoring in Financial Planning to become actively involved in their school and major.
- 4) To provide a degree of practical Experience for the members of the PCFP.

Article 3

OFFICERS AND THEIR DUTIES

The main objective of these officers is to see that the purpose of the PCFP is met through the aforementioned objectives.

Section 1. PRESIDENT: The President shall preside over all meetings having general and active supervision over the property, business affairs, and other officers of the PCFP. The President is responsible for submitting the list of new

officers to the Dean of Students within three weeks of their election. The President is responsible for submitting all revised PCFP Constitutions to the Dean of Students for approval. The President is Responsible for the direction of the PCFP.

Section 2. VICE PRESIDENT: The Vice President will assume the role of President in the absence of said President. The Vice President will preside directly over the Directors and their Committees. The Vice President will report Directly to the President. The Vice President is responsible for the Directors' task and duty accomplishment.

Section 3. SECRETARY: The Secretary is responsible for the reading and the taking of the minutes of all Official PCFP meetings. The Secretary reports to the President.

Section 4. TREASURER: The Treasurer is responsible for keeping track of the PCFP's finances. The treasurer is also responsible for reporting the financial situation of the PCFP at all Official PCFP meetings. The treasurer is also responsible for an accounting of the funds spent at the request of the President or a majority of the Board of Directors. The Treasurer shall keep accounts, deposits of the organization's funds, and make expenditures in a manner approved by the Office of the Fiscal Director of Student Finance. The Treasurer is responsible for preparing a budget for the school year and submitting it to the President of the PCFP for Approval. The Treasurer is then responsible for submitting the budget to the Business Office of Student Finance for approval. The Treasurer reports to the President.

Section 5. Director of IAFP Review: The DOIR is responsible for keeping the PCFP up to date with respect to industry events, news, developments, and the Indianapolis Chapter meetings. The DOIR is responsible for giving a report at all Official PCFP meetings that pertain to the topics mentioned above. The DOIR is responsible for heading his committee. The DOIR reports to the Vice President.

Section 6. Director of Speakers Bureau: The DOSB is responsible for periodically obtaining speakers to speak to the PCFP. The DOSB is responsible for giving a report at all Official meetings of the PCFP with regard to who has been contacted and or who is being pursued. The DOSB is responsible for heading his committee. The DOSB reports to the Vice President.

Section 7. Director of Public Relations: The DOPR is responsible for publishing the official PCFP newsletter on a timely basis , such as once a month or as requested by the President. The DOPR reports to the President and has no committee.

Section 8. Director of Publicity: The DOP is responsible for publicizing the PCFP events, such as personals or displays. The DOP is responsible for heading up his own committee. The DOP reports to the Vice President.

Section 9. Director of Course Review: The DOCR is responsible for updating the PCFP on matters that affect the students in Financial Planning with regard to courses. This Director should work closely with faculty on issues related to, courses other schools offer, introducing new classes, and or readjusting the current course requirements. The DOCR is responsible for giving a report related to these topics at all Official PCFP meetings. The DOCR reports to the Vice President.

Section 10. Director of Placement: The DP is responsible for updating the PCFP on issues related to placement. The DP is responsible for giving a report at all Official PCFP meetings. The report should include information with regard to placement activities of the University, who is coming to recruit, and alternative methods of placement. The DP is responsible for heading up his own committee. The DP reports to the Vice President.

Section 11. Committee: A committee person must be a member of the PCFP. They will report to their individual Director and then to the Vice President. A committee can consist of as many students as the Director feels is necessary.

Section 12. Faculty Advisor: The PCFP must have a minimum of one Advisor who is a member of the IAFP. The President should assume the responsibility for obtaining this Advisor. The term of said Advisor is left to the discretion of the PCFP and said Advisor.

#### Article 4

##### ELECTIONS AND OFFICE TERMS

Section 1. Elections: Elections will be held once a year near the end of March. Special Elections may be called by the President or a majority of the Board of Directors for the purpose of filling a vacated office.

Section 2. Term: The term of all offices is a maximum of one year and then an election must occur. No one person can hold the same office for more than one school year.

## Article 5

### MEETINGS

Section 1. Official Meetings: These meetings require the attendance of all officers and should be held on a timely basis, such as once a week. These Meetings are the forum in which the officers are to give the reports.

Section 2. Special Meetings: These meetings can be called by the President or a Majority of the Board of Directors. These meetings should be called for Special Elections, speaking events, or other such necessities that may arise from time to time.

## Article 6

### DISCIPLINE

Section 1. Disciplinary Action: Disciplinary action can be taken against any officer if said officer consistently neglects his duties. An officer may be removed from office by a two thirds vote of the officers. Disciplinary action can be brought up only at Official PCFP meetings with ninety percent of the officers in attendance including the accused. The President or a majority of the Board of Directors can bring up a Disciplinary action.

## Article 7

### DUES

Section 1. Local PCFP Dues: These dues are assessed at the beginning of each school semester. These dues will amount to five dollars each semester. The benefits of which are membership in the PCFP and the right to seek an office \*(see restrictions Article 7 Section 2).

Section 2. IAFP Dues: These dues can be paid at any time to the IAFP. These dues will amount to the IAFP stated rate for student members. The benefits of membership include all stated benefits to student members. \*The President and the Director of IAFP Review are required to be members of the IAFP.

Section 3. Combination: A combination of both dues, General and IAFP must be paid to realize all benefits of the PCFP and the IAFP. Individuals may become PCFP members but will not receive the benefits outlined in Article 7 Section 2. An individual may become a member of the IAFP but will not receive the benefits outlined in Article 7 Section 1. To be a fully active member both dues should be paid, however this is not required.

## Article 8

### MEMBERSHIP

Membership and participation shall be free from Discrimination based on race, religion, ethnic group, national origin, handicap, or sex.

Section 1. PCFP Members: PCFP members must be Purdue University Students.

Section 2. PCFP Officers: PCFP officers must meet University Requirements outlined in University Senate Document 70-16 Section 41.65.

Section 3. Staff and Faculty: Associate memberships are available for staff and faculty of Purdue University.

Section 4. IAFP Members: IAFP members must abide by IAFP guidelines.

## Article 9

### AMENDMENTS

Section 1. Amendments: An amendment to this Constitution must be brought up at an Official PCFP meeting with at least ninety percent of the officers attending. A two thirds majority vote is needed to amend. All PCFP members are entitled to one vote.

Section 2. University: All amendments to the Constitution are subject to the Approval of the Office of the Dean of Students.



1990-91 IAFP BOARD OF DIRECTORS

MISSION STATEMENT: To enhance the financial planning profession by providing continuing education; networking opportunities; current information; and leadership in supporting ethical standards of practice while increasing public awareness of the benefits of financial planning.

President . . . . . / Shelly Willingham  
G. L. Pittsford & Associates, Inc.  
8335 Allison Pointe Trail, Suite 190  
Indianapolis, IN 46250-1685  
(317)849-9559  
FAX #: 577-8575

President-Elect . . . ✓ . Kent Jacobs, CFP  
8440 Woodfield Crossing Blvd.  
Suite 300  
Indianapolis, IN 46260  
(317) 253-0453  
FAX #: 251-0069

V. P./Programs . . . / . Rhoda Israelov, CFP, CLU  
Shearson, Lehman Hutton  
201 N. Illinois Street, Suite 400  
Indianapolis, IN 46204  
(317) 237-3055  
FAX #: 634-6398

/ Thomas J. Ward, CFP  
IDS Financial Services, Inc.  
9200 Keystone Crossing, Suite 100  
Indianapolis, IN 46240  
(317) 844-6441  
FAX #: 574-3346

V. P./Symposium . . . . . Henry S. Berman  
Provident Mutual Financial Services  
410 Sheffield Drive  
Bloomington, IN 47401  
(812) 336-2295

Judy Knafel, CFP  
INB National Bank  
151 N. Delaware, Suite M-1010  
Indianapolis, IN 46266  
(317) 266-6584  
FAX #: 266-6567

V. P./Membership . . . Charles T. Shearman, CFP  
G. L. Pittsford & Associates, Inc.  
8335 Allison Pointe Trail, Suite 190  
Indianapolis, IN 46250-1685  
(317) 849-9559  
FAX #: 577-8575

V. P./Publications . . . Susan Mills, CFP  
Unified Management Corporation  
429 N. Pennsylvania Street  
Indianapolis, IN 46  
(317) 634-3300 ext. 8746  
FAX #: 634-3300 ext. 8992

Treasurer . . . . . Debra A. Bennett, CFP  
Bank One, Indianapolis, NA  
Bank One Center/Tower  
111 Monument Circle, Suite 1711  
P. O. Box 7700  
Indianapolis, IN 46277-0117  
(317) 321-3056  
FAX #: 321-8588

National Liaison . . . . . Elaine Bedel  
8911 Dandy Trail  
Indianapolis, IN 46234  
(317) 293-6676

Regulatory Liaison . . . Richard Randall, JD, CFP  
10291 N. Meridian Street, Suite 125  
Indianapolis, IN 46290  
(317) 574-9911  
FAX #: 844-9614

IAFP-ICFP/PR . . . . . Chap Mitzell, CFP  
The Windsor Group, Ltd.  
10291 N. Meridian Street, Suite 300  
Indianapolis, IN 46290  
(317) 848-3005  
FAX #: 844-9614

Chapter Administrator . . . Kim B. Stoneking  
Indiana State Association of  
Life Underwriters  
3009 East 96th Street  
Indianapolis, IN 46240  
(317) 844-6268  
FAX #: 844-7659

CHAPTER OFFICERS FACT SHEET

Chapter Name: INDIANA  
Submitted By: GRACE M. WORLEY Title: TREASURER  
Date: 9/2/86 Date Elections Held: JUNE 19, 1986

PRESIDENT

Name: CARL W. GROW  
Company: (see attached)  
Address: \_\_\_\_\_  
City/State/Zip: \_\_\_\_\_  
Office Telephone: \_\_\_\_\_

VP - MEMBERSHIP

Name: \_\_\_\_\_  
Company: \_\_\_\_\_  
Address: \_\_\_\_\_  
City/State/Zip: \_\_\_\_\_  
Office Telephone: \_\_\_\_\_

EXECUTIVE VP - PRESIDENT ELECT

Name: \_\_\_\_\_  
Company: \_\_\_\_\_  
Address: \_\_\_\_\_  
City/State/Zip: \_\_\_\_\_  
Office Telephone: \_\_\_\_\_

VP - PROGRAMS

Name: \_\_\_\_\_  
Company: \_\_\_\_\_  
Address: \_\_\_\_\_  
City/State/Zip: \_\_\_\_\_  
Office Telephone: \_\_\_\_\_

SECRETARY

Name: \_\_\_\_\_  
Company: \_\_\_\_\_  
Address: \_\_\_\_\_  
City/State/Zip: \_\_\_\_\_  
Office Telephone: \_\_\_\_\_

VP - PUBLIC RELATIONS

Name: \_\_\_\_\_  
Company: \_\_\_\_\_  
Address: \_\_\_\_\_  
City/State/Zip: \_\_\_\_\_  
Office Telephone: \_\_\_\_\_

TREASURER

Name: \_\_\_\_\_  
Company: \_\_\_\_\_  
Address: \_\_\_\_\_  
City/State/Zip: \_\_\_\_\_  
Office Telephone: \_\_\_\_\_

VP - ETHICS

Name: \_\_\_\_\_  
Company: \_\_\_\_\_  
Address: \_\_\_\_\_  
City/State/Zip: \_\_\_\_\_  
Office Telephone: \_\_\_\_\_

OTHER OFFICERS

Title: \_\_\_\_\_  
Name: \_\_\_\_\_  
Company: \_\_\_\_\_  
Address: \_\_\_\_\_  
City/State/Zip: \_\_\_\_\_  
Office Telephone: \_\_\_\_\_

Title: \_\_\_\_\_  
Name: \_\_\_\_\_  
Company: \_\_\_\_\_  
Address: \_\_\_\_\_  
City/State/Zip: \_\_\_\_\_  
Office Telephone: \_\_\_\_\_

Title: \_\_\_\_\_  
Name: \_\_\_\_\_  
Company: \_\_\_\_\_  
Address: \_\_\_\_\_  
City/State/Zip: \_\_\_\_\_  
Office Telephone: \_\_\_\_\_

Title: \_\_\_\_\_  
Name: \_\_\_\_\_  
Company: \_\_\_\_\_  
Address: \_\_\_\_\_  
City/State/Zip: \_\_\_\_\_  
Office Telephone: \_\_\_\_\_

BOARD OF DIRECTORS:(please list names only)

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

INTERNATIONAL ASSOCIATION FOR FINANCIAL PLANNING

Board of Directors

*NOT A BOARD MEMBER*

Carl W. Grow  
Coopers & Lybrand  
2900 One American Square  
Indianapolis, Indiana 46282  
(317) 639-4161

Elaine E. Bedel  
Coopers & Lybrand  
2900 One American Square  
Indianapolis, Indiana 46282  
(317) 639-4161

~~Mike Flasco  
F & L Group  
9202 North Meridian  
Suite 380  
Indianapolis, Indiana 46260  
(317) 846-4092~~ *Resigned*

R. Michael Fox, Jr.  
Lifeway, Inc.  
6308 Rucker Road  
Suite A  
Indianapolis, Indiana 46220  
(317) 253-1402

John W. Guy  
Dean, Witter Reynolds  
One Indiana Square  
Suite 1600  
Indianapolis, Indiana 46204  
(317) 263-5511

R. Terry Heath  
Hall, Render, Killian,  
Heath & Lyman  
Suite 1100  
One American Square  
Indianapolis, Indiana 46282  
(317) 633-4884

William M. Howell  
Howell & Associates  
6525 East 82nd Street  
Indianapolis, Indiana 46250  
(317) 845-0023

Rhoda Israelov  
E.F. Hutton  
One American Square  
Indianapolis, Indiana 46282  
(317) 632-6300

\* Lois A. Johnson  
Coopers & Lybrand  
2900 One American Square  
Indianapolis, Indiana 46282  
(317) 639-4161

James D. Keckley  
American Fletcher National Bank  
101 Monument Circle  
Suite 1000  
Indianapolis, Indiana 46277  
(317) 639-3131

Moses Ko  
MKO & Associates  
2625 North Meridian #21  
Indianapolis, Indiana 46208  
(317) 926-6688

Susan Mills  
Unified Management Company  
20 North Meridian  
Suite 600  
Indianapolis, Indiana 46204  
(317) 634-3300

Paul W. Morris  
Morris Group  
8455 Keystone Crossing #210  
Indianapolis, Indiana 46240  
(317) 842-5306

R. Mark Rushing  
Crown Associates of Indiana  
8330 Woodfield Crossing Blvd.  
Suite 150  
Indianapolis, Indiana 46240  
(317) 844-6301

Gary Stump  
Dean, Witter Reynolds  
11611 North Meridian, Suite 110  
Carmel, Indiana 46032  
(317) 848-1501

Grace Worley  
Financial Strategies Company  
8425 Keystone Crossing #250  
Indianapolis, Indiana 46240  
(317) 257-5825

\* Administrative Coordinator

INTERNATIONAL ASSOCIATION FOR FINANCIAL PLANNING

*Indianapolis # 066*

Board of Directors

✓ Carl W. Grow - *Pres.*  
Coopers & Lybrand  
2900 One American Square  
Indianapolis, Indiana 46282  
(317) 639-4161

✓ Elaine E. Bedel  
Coopers & Lybrand  
2900 One American Square  
Indianapolis, Indiana 46282  
(317) 639-4161

✓ Mike Flasco  
F & L Group  
9202 North Meridian  
Suite 380  
Indianapolis, Indiana 46260  
(317) 846-4092

*as per m grow 8/6/84  
Resigned*

✓ R. Michael Fox, Jr. - *Sec.*  
Lifeway, Inc.  
6308 Rucker Road  
Suite A  
Indianapolis, Indiana 46220  
(317) 253-1402

✓ John W. Guy  
Dean, Witter Reynolds  
One Indiana Square  
Suite 1600  
Indianapolis, Indiana 46204  
(317) 263-5511

✓ R. Terry Heath  
Hall, Render, Killian,  
Heath & Lyman  
Suite 1100  
One American Square  
Indianapolis, Indiana 46282  
(317) 633-4884

✓ William M. Howell  
Howell & Associates  
6525 East 82nd Street  
Indianapolis, Indiana 46250  
(317) 845-0023

✓ Rhoda Israelov  
E.F. Hutton  
One American Square  
Indianapolis, Indiana 46282  
(317) 632-6300

⊕ \* Lois A. Johnson  
Coopers & Lybrand  
2900 One American Square  
Indianapolis, Indiana 46282  
(317) 639-4161

✓ James D. Keckley - *Ex VP*  
American Fletcher National Bank  
101 Monument Circle  
Suite 1000  
Indianapolis, Indiana 46277  
(317) 639-3131

✓ Moses Ko - *VP - Publications*  
MKO & Associates  
2625 North Meridian #21  
Indianapolis, Indiana 46208  
(317) 926-6688

✓ Susan Mills - *VP Membership*  
Unified Management Company *no mail.*  
20 North Meridian  
Suite 600  
Indianapolis, Indiana 46204  
(317) 634-3300

✓ Paul W. Morris  
Morris Group  
8455 Keystone Crossing #210  
Indianapolis, Indiana 46240  
(317) 842-5306

✓ R. Mark Rushing - *VP Ethics*  
Crown Associates of Indiana  
8330 Woodfield Crossing Blvd.  
Suite 150  
Indianapolis, Indiana 46240  
(317) 844-6301

✓ Gary Stump - *VP Prog.*  
Dean, Witter Reynolds  
11611 North Meridian, Suite 110  
Carmel, Indiana 46032  
(317) 848-1501

✓ Grace Worley - *Treas.* *reimb. checks*  
Financial Strategies Company  
8425 Keystone Crossing #250  
Indianapolis, Indiana 46240  
(317) 257-5825

\* Administrative Coordinator

*let*

IAFP CHAPTER OFFICER FACT SHEET - CHAPTER YEAR 1989-90

POSITIONS EFFECTIVE 7/1/1989

TYPE OR PRINT ONLY

Chapter Name: Indianapolis

Submitted By: Susan Mills Title: President

Date Submitted: 6-13-89 Date Election Held: formally 6-29-89

CHAPTER ADMINISTRATOR

Full Name: \_\_\_\_\_

Company: \_\_\_\_\_

Address: \_\_\_\_\_

\_\_\_\_\_

City/State/Zip \_\_\_\_\_

Office Phone: (     ) \_\_\_\_\_

Fax Phone Number if Available (     ) \_\_\_\_\_

*will advise*

Alternate Address if P.O. Box (UPS)

Susan Mills

Unified Management

429 N. Pennsylvania

Indianapolis In 46204

04/14/89  
OFFFACT/MEMSHIP

BOARD OF DIRECTORS  
1989-1990  
Effective 7/1/1989

**PRESIDENT**

*see attached*

Name: \_\_\_\_\_

Company \_\_\_\_\_

Address \_\_\_\_\_

City/State/Zip: \_\_\_\_\_

Office Phone: (     ) \_\_\_\_\_

**SECRETARY**

*this will be administrator  
will advise*

Name: \_\_\_\_\_

Company \_\_\_\_\_

Address: \_\_\_\_\_

City/State/Zip: \_\_\_\_\_

Office Phone: (     ) \_\_\_\_\_

**PRESIDENT-ELECT**

*see attached*

Name: \_\_\_\_\_

Company \_\_\_\_\_

Address: \_\_\_\_\_

City/State/Zip: \_\_\_\_\_

Office Phone: (     ) \_\_\_\_\_

**TREASURER**

*see attached*

Name: \_\_\_\_\_

Company \_\_\_\_\_

Address: \_\_\_\_\_

City/State/Zip: \_\_\_\_\_

Office Phone: (     ) \_\_\_\_\_

**MEMBERSHIP VICE PRESIDENT**

*see attached*

Name: \_\_\_\_\_

Company: \_\_\_\_\_

Address: \_\_\_\_\_

City/State/Zip: \_\_\_\_\_

Office Phone: (     ) \_\_\_\_\_

**PROGRAMS VICE PRESIDENT**

*see attached*

Name: \_\_\_\_\_

Company: \_\_\_\_\_

Address: \_\_\_\_\_

City/State/Zip \_\_\_\_\_

Office Phone: (     ) \_\_\_\_\_

(over)

OFFFACT/MEMSHIP

INVOICE

International Association for Financial Planning

Two Concourse Parkway  
Suite 800  
Atlanta, Georgia 30328  
(404) 395-1605



Kim Mckinney  
Forbes Financial Group  
520 Kimber Lane  
Evansville, IN 47715

"Code of Professional Ethics"

100 ordered @ 15¢

15¢ Each

\$15.00

TOTAL

\$15.00

8/10/89 JJD

Return Copy With Remittance



**DIRECTORS**  
1989-1990  
Effective 7/1/1989

*See list*

Name: \_\_\_\_\_

Company: \_\_\_\_\_

Address: \_\_\_\_\_

City/State/Zip: \_\_\_\_\_

Office Phone: (     ) \_\_\_\_\_

Assigned Task or Title  
\_\_\_\_\_

Name: \_\_\_\_\_

Company: \_\_\_\_\_

Address: \_\_\_\_\_

City/State/Zip: \_\_\_\_\_

Office Phone: (     ) \_\_\_\_\_

Assigned Task or Title  
\_\_\_\_\_

Name: \_\_\_\_\_

Company: \_\_\_\_\_

Address: \_\_\_\_\_

City/State/Zip: \_\_\_\_\_

Office Phone: (     ) \_\_\_\_\_

Assigned Task or Title  
\_\_\_\_\_

Name: \_\_\_\_\_

Company: \_\_\_\_\_

Address: \_\_\_\_\_

City/State/Zip: \_\_\_\_\_

Office Phone: (     ) \_\_\_\_\_

Assigned Task or Title  
\_\_\_\_\_

Name: \_\_\_\_\_

Company: \_\_\_\_\_

Address: \_\_\_\_\_

City/State/Zip: \_\_\_\_\_

Office Phone: (     ) \_\_\_\_\_

Assigned Task or Title  
\_\_\_\_\_

Name: \_\_\_\_\_

Company: \_\_\_\_\_

Address: \_\_\_\_\_

City/State/Zip: \_\_\_\_\_

Office Phone: (     ) \_\_\_\_\_

Assigned Task or Title  
\_\_\_\_\_

(over)

INDIANAPOLIS CHAPTER  
1989-90 BOARD OF DIRECTOR

217-

- President.....Susan Mills, CFP.....634-3300 x8746  
FAX...634-3300 x8999  
Unified Management Corp.  
429 N. Pennsylvania  
Indianapolis, IN 46204
  
- President-Elect.....Shelly Willingham.....849-9559  
FAX...577-8575  
G.L. Pittsford & Associates  
8335 Allison Pointe Trail, #190  
Indianapolis, IN 46250
  
- Vice-President/Programs.....Charles Shearman, CFP.....849-9559  
FAX...577-8575  
G.L. Pittsford & Associates  
8335 Allison Pointe Trail, #190  
Indianapolis, IN 46250
  
- Vice President/Membership....Jerry Hopkins, CFP.....266-6774  
INB National Bank  
One Indiana Square, #438  
Indianapolis, IN 46266
  
- Vice President/Publications..Richard L. Randall, JD CFP..848-3005  
The Windsor Group, Ltd.  
10291 N. Meridian, Suite 300  
Indianapolis, IN 46290
  
- Treasurer.....David Weaver CFP,CLU,ChFC...844-7020  
Dave Weaver Agency  
581 S. Range Line Road, #B-4  
Carmel, IN 46032
  
- National Liaison.....Elaine Bedel, CFP.....293-6676  
8911 Dandy Trail  
Indianapolis, IN 46234
  
- Regulatory Liaison.....Rhoda Israelov, CLU, CFP....237-3055  
FAX...237-3111  
Shearson, Lehman, Hutton  
201 N. Illinois, Suite 400  
Indianapolis, IN 46204
  
- Registry/<sup>PR</sup>Liaison.....Channing E. Mitzell.....848-3005  
The Windsor Group, Ltd.  
10291 N. Meridian Street, #300  
Indianapolis, IN 46290
  
- Corporate/BD Liaison.....John Guy, CFP.....263-5511  
Dean Witter Reynolds  
251 N. Illinois, #1600  
Indianapolis, IN 46204

Foundation Liaise .....Moses Ko.....926-6688  
FAX...926-6735

MKO & Associates  
3135 N. Meridian Street  
Indianapolis, IN 46208

*Not member*

ICFP Liaison.....Brent L. Emerich, CFP.....848-4270  
Comprehensive Fincl Planning Svcs  
10293 N. Meridian Street, #200  
Indianapolis, IN 46290

Director.....Kent Jacobs, CFP.....253-0453  
8440 Woodfield Blvd. Crossing, #300  
Indianapolis, IN 46260

Director.....Judy Knafel, CFP.....266-6584  
Indiana National Bank  
151 N. Delaware, Suite M-1010  
Indianapolis, IN 46266

Director.....Ellen Jones Morell, CLU, ChFC. 843-5410  
Renaissance, Inc.  
11595 N. Meridian, #250  
Carmel, IN 46032

Director.....Larry A. Lyday, CLU ChFC....845-9777  
Executive Financial Group, Inc.  
7440 N. Shadeland, #130  
Indianapolis, IN 46250

Director.....Deborah Gootee, CFP.....266-6194  
Indiana National Bank  
One Indiana Square, #102  
Indianapolis, IN 46266

Director.....Jerome M. Strauss, JD.....236-2260  
Ice Miller Donadio & Ryan  
34th Fl, One American Square  
Indianapolis, IN 46282

*Joined 4-89*

Director.....Jack F. Holmes.....924-1264  
Holmes & Holmes  
3703 Washington Blvd.  
Indianapolis, IN 46205

Director.....Earl Stutsman.....887-5048  
Investment Management Research  
494 S. Emerson Avenue, #E  
Greenwood, IN 46143

Indianapolis Chapter  
of the  
International Association of Financial Planners, Inc.

BYLAWS

66

Article I

NAME

The name of this organization shall be the Indianapolis Chapter of the International Association of Financial Planners, Inc. (hereinafter the "Indianapolis Chapter"). The Indianapolis Chapter is a non-profit corporation incorporated under the laws of the State of Indiana which is part of and exists pursuant to the International Association of Financial Planners, Inc. (hereinafter the "International Association").

Article II

OBJECTIVES

The objectives of the Indianapolis Chapter shall be to serve its members and to promote financial planning to:

1. Build an awareness of the need for a unified approach to the solution of the financial planning client's problems.
2. Create a dialogue among professional groups whose activities often mesh in the course of defining and solving financial planning problems for the client.
3. Provide additional opportunities for members to increase their financial planning expertise through training courses, seminars, conventions, and other services to members.
4. Preserve and maintain high ethical standards among financial planning practitioners by defining, publishing and enforcing a Code of Ethics for all members of the International Association of Financial Planners, Inc.
5. Encourage and assist its members in the formation and development of local chapter education, programs and activities which will further the objectives of the International Association of Financial Planners, Inc.
6. Cooperate with and support, when appropriate, other associations and organizations which by purpose and activity demonstrate a commitment to objectives compatible with those of the International Association of Financial Planners, Inc.

INDIVIDUAL MEMBERSHIP

Section 1. QUALIFICATION: Qualification for membership in the International Association shall constitute qualification for membership in the Indianapolis Chapter and shall be: (1) a professional interest in financial planning; (2) sponsorship by a member of the International Association, which member is in good standing and has been a member for at least one year; and (3) a written commitment to abide by the Bylaws and the Code of Ethics of the International Association.

Section 2. APPLICATION FOR MEMBERSHIP: All applicants for membership in the Indianapolis Chapter shall complete, sign and submit to the International Association offices the membership application required and provided by said Association.

Section 3. RESIGNATION, SUSPENSION OR REMOVAL: All rights, privileges and requirements regarding the resignation, suspension or removal of any member shall be regulated and governed by those rules, regulations and Bylaws of the International Association.

Article IV

CORPORATE MEMBERSHIP

Section 1. QUALIFICATION: Qualification for member in the International Association shall constitute qualification for membership in the Indianapolis Chapter and shall be (1) active participation in the financial services industry; (2) sponsorship by a member of the International Association which member is in good standing and has been a member for at least one year; and (3) an expressed commitment to abide by the Code of Ethics, and the Bylaws of the International Association.

Section 2. APPLICATION FOR CORPORATE MEMBERSHIP: All applicants for corporate membership in the Indianapolis Chapter shall complete, sign and submit to the International offices the membership application required and provided by said Association.

Section 3. RESIGNATION, SUSPENSION OR REMOVAL: All rights, privileges and requirements regarding the resignation, suspension or removal of any member shall be regulated and governed by those rules, regulations and Bylaws of the International Association.

Article V

DUES

Section 1. ESTABLISHMENT OF DUES: Membership dues as established by the International Association shall be and constitute membership dues for the Indianapolis Chapter, providing, however, that Chapter membership dues may be established from time to time by the Board of Directors of the Indianapolis Chapter.

Section 2. REFUNDS: No dues shall be refunded to any member whose membership terminates for any reason.

Section 3. DELINQUENCY AND CANCELLATION: All rights and privileges of memberships regarding delinquency or failure to pay dues shall be regulated and governed by the rules, regulation and Bylaws of the International Association.

Article VI

BOARD OF DIRECTORS

Section 1. AUTHORITY AND RESPONSIBILITY: The governing body of this Association shall be the Board of Directors. The Board of Directors shall manage, supervise, control and direct the affairs of the Indianapolis Chapter. The Board of Directors shall determine the policies of the Indianapolis Chapter, shall actively pursue the objectives of the Indianapolis Chapter and shall supervise the receipt and the disbursement of Chapter funds. The Board of Directors may delegate areas of its authority as it deems appropriate.

Section 2. COMPOSITION: The Board of Directors shall consist of not less than three (3) nor more than eleven (11) voting members.

Section 3. QUALIFICATION: Any member in good standing shall be eligible to be elected or appointed a member of the Board.

Section 4. ELECTION: The Directors present for the meeting immediately preceding the International Association Annual Convention shall elect or appoint Directors for the upcoming year.

Section 5. TERM OF OFFICE: Directors shall, upon their election or appointment, enter into the performance of their duties concurrent with the adjournment of the International Association's Annual Convention and shall continue in office, unless they resign or are removed, until their successors shall be duly elected or appointed and qualified.

Section 6. MEETINGS OF THE BOARD: Regular meetings of the Board of Directors shall be held no less than two times during each year at such time and such place as the Board of Directors may prescribe. Notice of all such meetings shall be sent by mail or other mode of transmittal to each member of the Board of Directors at his last known address in the records of the Association offices not less than ten (10) days in advance of such meetings.

Special meetings of the Board of Directors may be called by the President or at the request of any four (4) Directors, by notice mailed, telephoned, or delivered by telegraph to each member of the Board of Directors not less than seventy-two (72) hours before the meeting is to be held.

Section 7. QUORUM OF THE BOARD: At any meeting of the Board of Directors no less than four (4) members of the Board of Directors shall constitute a quorum for the transaction of business of the Indianapolis Chapter and any such business thus transacted shall be valid providing it is affirmatively passed upon by the majority of the Directors present, except as otherwise provided in these Bylaws.

Section 8. VOTING: Voting rights of a Director shall not be delegated to another or exercised by proxy.

Section 9. RESIGNATION AND/OR REMOVAL: Any Director may resign at any time by giving written notice to the President, the Secretary or to the Board of Directors. Such resignation shall take effect at the time specified therein, or, if not specified, at the time of acceptance as determined by the Board of Directors. The Board of Directors may, in its discretion, by affirmative vote of two-thirds of all of its members, remove any Director from office.

Section 10. VACANCIES: Any vacancies that may occur on the Board of Directors by reason of death, resignation, removal or otherwise shall be filled in the case of an elected or appointed Director through selection by the remaining members of the Board of Directors.

Section 11. COMPENSATION: Directors and elected Officers shall not receive any compensation for their services as Directors. However, the Board of Directors by resolution may authorize reimbursement of all or a portion of expenses which are incurred by Directors in the performance of their duties.

## Article VII

### OFFICERS

Section 1. OFFICERS: The officers of the Indianapolis Chapter shall consist of a President, a Vice-President of Programs, a Vice-President of Education, a Vice-President of Membership, a Treasurer, a Secretary and such other officers as the Board of Directors may from time to time appoint or elect. All such officers shall be elected annually by a majority vote of the Directors present at the meeting immediately preceding the International Association's Annual Convention.

Section 2. QUALIFICATION FOR OFFICE: Any member in good standing shall be eligible for election as an officer of the Indianapolis Chapter.

Section 3. TERM OF OFFICE: The officers shall hold office for a term of one year or until his successor is duly qualified and elected. Such term of office shall commence concurrently with the adjournment of the meeting of the Board of Directors immediately preceding the International Association's Annual Convention.

Section 4. NOMINATIONS: In accordance with the procedure specified by Article X, Section 1., the Nominating Committee shall prepare and submit nominations for each of the elected offices, to the Board of Directors at the meeting prior to election. Any person so nominated shall have given his prior consent to nomination and election as an Officer. Any Director can nominate any current Director who is qualified for an office in accordance with these bylaws. Such nominations need no second.

Section 5. ELECTION: All officers shall be elected by a majority of those members of the outgoing Board of Directors present at the meeting immediately preceding the International Association's Annual Convention.

Section 6. REELECTION: The office of President shall not be held by the same person more than once in any two year period.

Section 7. RESIGNATION AND/OR REMOVAL: Any officer may resign at any time by giving written notice to the President, to the Secretary or to the Board of Directors. Such resignation shall take effect at the time specified therein, or if a time is not specified, at the time of acceptance thereof as determined by the Board of Directors. The Board of Directors may, in its discretion, by affirmative vote of two-thirds of all its members, remove any officer from office.

Section 8. VACANCIES: Any vacancy in any elected office may be filled for the balance of the term thereof by the Board of Directors at any regular or special meeting. In its discretion, the Board of Directors, by a vote of the majority of the entire Board, may leave unfilled for any period as it may fix by resolution any office except that of President, Secretary, and Treasurer.

Article VIII

DUTIES OF OFFICERS

The officers of the Indianapolis Chapter have the following duties, with all powers necessary for the performance thereof, and such other duties and powers as the Board of Directors may designate.

Section 1. PRESIDENT: The President shall be the Chief Executive Officer of the Indianapolis Chapter. He shall preside at the meetings of the Board of Directors and at all meetings of the members. He shall exercise such duties as customarily pertaining to the office of President and shall have general and active supervision over the property, business and affairs of the Indianapolis Chapter and over its officers. The President shall make all required appointments of committees and shall serve as a member ex officio, with the right to vote, on all committees. The President shall perform such other duties as may be prescribed from time to time by the Board of Directors.

Section 2. VICE-PRESIDENT: Each of the Vice-Presidents shall have such powers and perform such duties as may be assigned by the President. In the absence of the President, the Vice-President of Programs shall perform the duties of the President.

Section 3. SECRETARY: The Secretary shall have responsibility to issue notices of all meetings of Directors and members; record minutes of such meetings; have charge of all corporate minute books, records, and papers; have custody of the seal of the Association; affix the seal of the Association to all instruments requiring the same; and perform all other duties as are incident to this office which may be assigned by the President. Unless otherwise directed by the Secretary, these duties shall be routinely performed by a member of the Indianapolis Chapter's staff selected by the President. The person so selected by the President shall be named Assistant Secretary and shall have the authority to sign as Assistant Secretary on all matters occurring in the ordinary course of the Indianapolis Chapter's business.

Section 4. TREASURER: The Treasurer shall have responsibility to receive and have custody of, and account for all money and securities of the Indianapolis Chapter; perform all other duties as may be required by the Board of Directors and do and perform such other duties as usually pertain to such office; deposit funds to the credit of the Indianapolis Chapter in such bank or banks or trust companies as the Board of Directors shall direct and disperse the same under the direction of the Board of Directors; keep regular books of account and submit them together with all vouchers, receipts, records and other papers, to the Directors for their examination and approval as often as they may require. The Treasurer shall perform such other duties as may be prescribed from time to time by the President. Unless otherwise directed by the Treasurer, his duties shall be routinely performed by a member, or members of the Indianapolis Chapter's staff selected by the President.

Article IX

NOMINATING COMMITTEE

Section 1. NOMINATING COMMITTEE: The President shall appoint and chair the Nominating Committee, which shall consist of the President, and any two other Directors. The Committee members shall be announced to the Board of Directors no less than 45 days prior to the meeting of the Board of Directors at which nominations are to be made.



Section 2. NOMINATION OF OFFICERS: The Nominating Committee shall nominate candidates for the offices of the Indianapolis Chapter and report such nominations at the meeting which immediately precedes the meeting at the International Association's Annual Convention. Any member of the Board of Directors can nominate for a Director any person who is qualified under the Bylaws. A final nominee for office, who is not elected an officer, shall be considered a nominee as a Director of the Indianapolis Chapter. Said nominations for Director shall be voted upon at such meeting.

#### Article X

##### OTHER COMMITTEES

The President shall appoint other committees and their chairmen as necessary and shall assign the duties of any such committee upon appointment. The President shall be a voting member of all committees. By a majority vote, the Board of Directors may determine not to convene a standing committee in any given year.

#### Article XI

##### FINANCE

Section 1. FISCAL PERIOD: The fiscal year of the Indianapolis Chapter shall be the year ending June 30th.

Section 2. BONDING: Trust or surety bonds may be furnished at the expense of the Indianapolis Chapter for the President, Vice-Presidents, Secretary and Treasurer and such other employees of the Indianapolis Chapter as the Board of Directors shall direct.

Section 3. BUDGET: The Board of Directors shall adopt for each coming fiscal year an annual operating budget covering all projected activities of the Indianapolis Chapter, which budget shall be prepared and submitted for adoption by the Treasurer.

Section 4. AUDIT: The accounts of the Indianapolis Chapter shall not require an annual audit by a Certified Public Accountant. An unaudited financial report, however, shall be prepared by Treasurer and provided to the Board of Directors at the first regular Board meeting following completion of such report and shall be available for review by any member at the principal office of the Indianapolis Chapter.

#### Article XII

##### DISSOLUTION

In the event of dissolution of this corporation, to the extent allowed under applicable law, all of the assets of the corporation shall be distributed to, or its assets shall be sold and the proceeds distributed to another organization organized and operated for the same purposes for which this corporation is organized and operated exclusively for religious, charitable, scientific, literary or educational purposes, which is an exempt organization under Section 501(c)(3) of the Internal Revenue Code of 1954, as amended and which shall be selected by the Board of Directors of this corporation. In the event that for any reason upon the dissolution of this corporation, the Board of Directors of the corporation shall fail to act in the manner herein provided within a reasonable time, a court of law having jurisdiction shall, upon application of one or more persons having a real interest in the corporation or its assets, make such distribution as herein provided.

Article XIII

MEETINGS

Section 1. MEETING OF THE MEMBERSHIP: Regular meetings of the membership of the Indianapolis Chapter shall be monthly with a minimum of eight (8) meetings per year. Notice of all such meetings of the memberships of the Indianapolis Chapter shall be sent by mail or other mode of transmittal to each at his last known address in the records of the Indianapolis Chapter not less than ten (10) days in advance of such meetings. Copies of each meeting notice shall be sent to the International Association office headquarters.

Section 2. CERTIFICATES OF MEMBERSHIP: A Certificate of Membership signed by the President or Vice-President of Membership, stating that such person or entity is a member, shall be conferred upon every member of the Indianapolis Chapter.

Article XIV

AMENDMENTS AND INTERPRETATION

These Bylaws may be amended by a two-thirds vote of the Board members present at any meeting of the Board duly called and regularly held, notice of such proposed changes having been sent in writing to members of the Board at least thirty days before such meeting. Any proposed amendments shall be proposed in writing to the Board of Directors.

The use of any gender herein shall include all genders and these Bylaws shall be interpreted accordingly.

Article XV

MISCELLANEOUS

Section 1. ADOPTION: The Indianapolis Chapter agrees to abide by the Bylaws of the International Association and hereby adopts and incorporates such Bylaws, to the extent necessary or appropriate, for a consistent interpretation and construction of the Bylaws of the Indianapolis Chapter.

Chapter Name: Indiana Chapter  
 Date Elections Held: June 20, 1984  
 Submitted By: John W. Guy

PRESIDENT

Name John W. Guy, CFP  
 Company Dean Witter Reynolds, Inc.  
 Address One Indiana Square  
 City/State/Zip Indianapolis, IN 46204  
 Phone 317-263-5511

EXECUTIVE VICE PRESIDENT

Name R. Terry Heath, Esq.  
 Company Hall, Render, Killian, Heath & Lyman PC  
 Address 3921 N. Meridian St. - Ste. 200  
 City/State/Zip Indianapolis, IN 46208  
 Phone 317-926-2326

MEMBERSHIP VICE PRESIDENT

Name Kathy McClanahan  
 Company Dean Witter Reynolds Inc.  
 Address One Indiana Square  
 City/State/Zip Indianapolis, IN 46204  
 Phone 317-263-5550

EDUCATIONAL PROGRAMS VICE PRESIDENT

Name Karen Chamberlain, CFP  
 Company Indiana National Bank  
 Address One Indiana Square- Mail Sta. 725  
 City/State/Zip Indianapolis, IN 46266  
 Phone 317-266-5706

SECRETARY

Name Carl Grow, CPA  
 Company Coopers & Lybrand  
 Address One American Square - #2900  
 City/State/Zip Indianapolis, IN 46282  
 Phone 317-639-4161

TREASURER

Name William Shaw  
 Company Langdon, Shaw & Brewer Inc.  
 Address 155 E. Market St. - #505  
 City/State/Zip Indianapolis, IN 46204  
 Phone 317-634-7272

VICE PRESIDENT PUBLIC RELATIONS & PUBLICATIONS

Name Susan Mills  
 Company Unified Management, Inc.  
 Address 20 N. Meridian Street  
 City/State/Zip Indianapolis, IN 46204  
 Phone 317-634-3300

VICE PRESIDENT-PERSONAL SKILLS PROGRAMS PROFESSIONAL DEVELOPMENT/EDUCATION

Name Rhoda Israelov, CFP, CLU  
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Name

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 Roster, Labels, D-Cards - Treasurer  
 Second Roster - Secretary



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Labels, Roster - Treasurer  
Roster - Secretary - Thomas McAllister



# Central Indiana Soc

of the Institute of Certified Financial Planners  
P.O. Box 68743  
Indianapolis, IN 46268  
(317) 255-5301

September 10, 1999

## VIA FACSIMILE

Mr. Thomas McAllister  
1098 Timber Creek Drive, Apt. 7  
Carmel, IN 46032-7571  
FAX: (317) 581-1261

Dear Mr. McAllister,

On behalf of the Central Indiana Society of the Institute of Certified Financial Planners, I want to thank you for your willingness to make a presentation on History of the Financial Planning Profession in Central Indiana, at the Central Indiana Financial Planning Conference to be held on Friday, September 17, 1999.

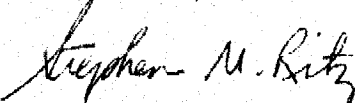
The meeting will be held at the Conseco Conference Center, 530 College Drive, Indianapolis, IN 46032. A map to this location is printed on the back of the conference flyer which you should already have received; if you need additional information on the location, please let me know. This is a very modern facility with excellent audio-visual equipment. If you will use audio-visual equipment during your presentation, please let me know so that we can make certain the room is properly set-up.

You are scheduled to speak from 1:00 p.m. to 1:30 p.m. You are invited to lunch which will be served at 12:00 noon. Also, please feel free to attend any of the other educational programs throughout the day.

All conference attendees will be provided a notebook containing handout materials. If you have not already done so, and wish to provide handout materials to be included in the conference materials, please let me know as soon as possible. In addition, if you have items, such as firm brochures, which you wish to display or distribute to attendees, there will be tables set-up for this purpose.

Again, I appreciate your time and effort in making this presentation. If you have any questions, or if there is anything I can do to assist you, please call me at (317) 580-5800. If you wish to mail or fax any materials to me, please send them to my office. My fax number is (317) 580-5810. My office address is 9465 Counselor's Row, Suite 108, Indianapolis, Indiana 46240.

Very truly yours,

  
Stephen M. Ritz