The Newsletter of FPA of Greater Kansas City

News&Views

January 2021

FINANCIAL PLANNING ASSOCIATION

GREATER KANSAS CITY

IN THIS ISSUE:

FPA of Greater Kansas City

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CAREER LISTINGS

Visit https://fpakc.org/Career-Listings/
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MESSAGE FROM THE PRESIDENT

by Tyler Landes, CFP®, AIF®

Welcome back for another year! Despite the challenges of 2020, there is much to look forward to, and I am honored to serve as your chapter President for 2021.

As last year forced us to adjust in our personal and work lives, it presented opportunities for our chapter to try some new digital methods of communications. I've been very happy to continue to network with many of you during virtual chapter and small group meetings over the past year, and I hope we can build on that going forward.

Our goal through these times and beyond is to have a place for everyone to feel like they fit within our chapter and to have multiple avenues to stay connected and access our valuable content and programming. We do this through our Chapter meetings, our NexGen and Women of FPA small groups, and our partner roundtable events. Our Communications and Public Awareness committees create content through our Newsletter, member articles in the KC Star, radio programming on KCUR, social media, and coming in 2021 discussions are underway to create a member-focused podcast that you can access on your own time.

Also, our Directors of Community Outreach and Government Relations find unique ways to connect with our greater Kansas City community through volunteering and advocacy. Our Co-Directors of Student Mentoring and Career Development are faculty at Mizzou and K-State who keep our Chapter connected to our local University financial planning programs to bring talented graduates into our community. We also have two members currently serving on the FPA National Board, past chapter president George Fernandez, and the 2021 FPA Board Chair, Dr. Martin Seay.

Looking ahead, and because we're all virtual meeting experts at this point, we do anticipate our monthly chapter meetings to continue virtually at least through mid-year. However, the Programs committee is planning a big return to meeting in-person as circumstances allow. I'm very excited to share that we'll host a full-day Symposium in August headlined by Michael Kitces, and to include the opportunity for multiple CE credits, breakout sessions, and the chance to visit with our industry partners and vendors to find new solutions for your firm. Stay tuned for more information in the coming months.

In the meantime, don't miss upcoming opportunities to hear from industry speakers like Chris Kuehl and Daniel Crosby. I encourage you to check out our small-group events where we can get to know each other better and stay connected from afar. This community has been the most valuable part of my time as a member of our chapter and Board. I started on our Membership Committee before serving as Director of NexGen, Treasurer, and finally as President-Elect. Despite all the CE credits and educational content, the most valuable thing I've gained over these years has been the connections and relationships with fellow members.

To conclude, I want to send a sincere thank you to each of you for continuing to participate in our community. I'd also like to extend a big thank you to our returning and new Board and Committee members for volunteering their time to keep our chapter moving forward.

Thank you and best wishes for the year ahead!

Tyler Landes, CFP®, AIF®
FPAGKC 2021 President

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Brandy Johnson, CAE
FPA of Greater Kansas City

MARCH CHAPTER MEETING

March 17, 2021

11:45 - 2:00 p.m.

VIRTUAL

ECONOMIC UPDATE

DR. CHRIS KUEHL
Managing Director, Armada Corporate Intelligence

IMPACT OF FINTECH ON FINANCIAL PLANNING

NIHARIKA SHAH
Chief Marketing Officer, The TIFIN Group

THIS MEETING SPONSORED BY:

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Registration:
Members $15
Non Member $29

Continuing Education:
CFP® - 2 hours approved
Kansas Insurance - 2 hours pending

Register Today: https://fpakc.org/event-4090729

CONGRATULATIONS SCHOLARSHIP WINNERS

Each year the Greater Kansas City Chapter awards the Annette Wells Memorial Scholarship to deserving CFP® candidates. The scholarship is in honor of Annette Wells, a former FPAGKC President who passed away from cancer.

FPAGKC President Tyler Landes had the privilege of presenting the 2020 Annette Wells Memorial Scholarships at the Virtual January Chapter Meeting. Olivia Stingo, Kansas State University and Conner Thompson, University of Missouri were both presented with scholarships from the chapter.

Congratulations Olivia and Conner!

WELCOME NEW MEMBERS

Paul Bennett
Hannah Rebekah Casteel
Joe Nafziger, CFP®
Joshua Newth
Ronald Schumaker
Thomas G. Wheeler, CFP®

MEMBER MILESTONES

Brian W. Harrold, ChFC-5 years
Christopher Klug-5 years
Gavin Richardson-5 years
Joel V. Reimer, CFP®, AIF®-10 years
Elias K. Sallman, CFP®, CIMA®-10 years
Richard L. Horn, CFP®-15 years
Richard A. Lundstrom, CFP®-15 years
Robert F. Overton, CFP®-15 years
Douglass R. Wiley, CFP®-15 years
Lucy L. Williams, CFP®-15 years
Jill A. Reynolds, CFP®-20 years
Thomas G. Wheeler, CFP®-20 years
Ann Woodyard, CFP®-20 years
Stephen P. Burk, CFP®-40 years

Take 5

January 2021

Happy New Year! Time to Enjoy all FPA Has to Offer You

Start 2021 on the right foot! Access all of your FPA member benefits, including on-demand webinars, digital issues of the *Journal of Financial Planning*, conversations with your peers on FPA Connect, and more. If you need any assistance, please contact us. We look forward to being here for you, and elevating the profession that transforms lives through the power of financial planning!

Patrick D. Mahoney Assumes Role as FPA's CEO

FPA is pleased to welcome Patrick D. Mahoney as the Association's new chief executive officer effective January 1. Mahoney is an experienced business leader and strategist with a background across diverse organizations in the financial services, technology and mission-based sectors. His career began in product development and general management in the U.S. and Asia, later evolving to sales, marketing and general management in non-profit and for-profit organizations. A former operations executive with S&P Global, past chief marketing officer for IEEE, and former president and CEO of IEEE GlobalSpec, Mahoney has brought and will continue to bring significant marketing, business development and financial oversight to FPA. As CEO, Mahoney will continue to lead the Association's day-to-day management and report to the FPA Board of Directors. Tune into this podcast to learn more.

What Are Your Peers Learning This Month?

Dive deeper into this month's *Journal of Financial Planning* to learn about college planning, how financial services can advance as a trusted profession, liability insurance, pandemic planning lessons, and more. Check out the January issue of the *Journal of Financial Planning*. Join this month's roundtable discussion to ask the *Journal* authors questions on their articles featured in the January issue.

**Thank you to our proud partner Ryan Insurance Strategy Consultants for powering the January 2021 issue of the Journal of Financial Planning.*

FPA

Take 5

FPA is Changing Tomorrows™ of Underserved and At-Risk Populations

FPA is committed to ensuring that the possibility of a brighter future is readily available to all who need these services but cannot afford or access them. Through the FPA Pro Bono Program, passionate financial planning practitioners are connected to individuals, families and communities in need. Volunteer now to transform lives through the power of financial planning.

YAFPNW Podcast: Giving Career Changers a Jumpstart

Dominique Henderson, CFP®, founder of DJH Capital Management and Jumpstart Coaching Lab, shares tips on how to help career changers find their footing and create a viable career path. In this episode of *You're a Financial Planner, Now What?*, you'll hear Henderson's views on what drives financial planners, the importance of soft skills, examples of career paths, his career challenges, marketing tips for reaching new clients, and more. Tune into this podcast now.

Making Philanthropy as Part of Your Financial Practice

Join Juan Ros, CFP®, AEP®, CSPG, CEPA, CVGA, financial adviser with Forum Financial Management and faculty member with the American Institute for Philanthropic Studies, to get a tangible action plan to incorporate philanthropic planning into your advisory practice, attract more next-generation clients to your business, and empower existing clients to make the most of their planned giving efforts. This live Knowledge Circle event will take place on Feb. 9 at 3 p.m. ET. Register now. And be sure to explore the benefits of charitable giving and how philanthropic opportunities can be designed to meet long-term client objectives by registering for Philanthropic Solutions in Financial Planning, a six-course certificate program developed by FPA and the American Heart Association.

FPA

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> *Principal | Senior Financial Planner*
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UMB

BRONZE PARTNERS

BlueRock Capital Markets

Waddell & Reed

CALENDAR OF EVENTS

February 4, 2021
5:00 p.m.
NexGen Marketing Power Session & Happy Hour

March 4, 2021
5:00 p.m.
NexGen Social Media Marketing Power Session & Happy Hour

March 17, 2021
11:45 a.m.-2:00 p.m.
March Virtual Chapter Meeting
Economic Update, Chris Kuehl
Impact of Fintech on Financial Planning, Niharika Shah
Sponsored by: The TIFIN Group

April 22, 2021
8:00 a.m.
Women of FPA Event: Saying No to Stress

May 19, 2021
2:45-5:00 p.m.
ETHICS Virtual Chapter Meeting
Ann Coulson, PhD, CFP®

June 16, 2021
11:45 a.m.-1:15 p.m.
Virtual Chapter Meeting
Behavioral Finance, Daniel Crosby

August 24, 2021
8:00 a.m.-5:00 p.m.
Symposium...details coming soon!

October 20, 2021
11:45 a.m.-2:00 p.m.
Embassy Suites, Olathe
October Chapter Meeting...details coming soon!

November 17, 2021
11:45 a.m.-2:00 p.m.
Embassy Suites, Olathe
November Chapter Meeting...details coming soon!

For a full list of events and registration please visit our website at https://fpakc.org/EventCalendar