

The Newsletter of FPA of Greater Kansas City

News & Views

October 2020



**FINANCIAL
PLANNING
ASSOCIATION**

**GREATER
KANSAS CITY**

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FPA of Greater Kansas City

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CAREER LISTINGS

Visit <https://fpakc.org/Career-Listings/>
for a full list of available positions.

MESSAGE FROM THE CHAPTER PRESIDENT

by Mark Albright, CFP®, CRPC®

As we enter the final months of this most unforgettable year, I wanted to take a minute to celebrate the accomplishments of some of our own. There are many benefits we receive through our involvement in the FPA, but I believe one of the greatest is the perspective we are able to gain by putting our heads together to solve the challenges we collectively face. Our local colleagues have always done a tremendous job contributing to these efforts on both the local and national levels, but few have contributed more than the following members.

In our September chapter meeting we were able to hear from Dr. Martin Seay who has served this year as our National FPA President. He shared updates on the initiatives they have been hard at work on, including the OneFPA transition and the search for the next CEO of FPA.

As we transition into 2021 we are happy to announce that George Fernandez has been selected to serve on the National FPA Board. George has over 30 years' experience in the financial services industry and

dedicated over 10 of those years serving on our board in the FPA of Greater KC chapter. His contributions to our chapter have been significant and I trust he will have the same impact on the national board.

We truly appreciate the contributions these individuals have made to give back to the financial planning community as well as help our voices be heard at the national level. This is especially true in a time with so much change happening within the FPA and the profession as a whole.

Thank you to these gentleman as well as everyone else who offers a hand to help lift our entire community.

Mark Albright, CFP®, CRPC®
FPAGKC President
Mark.Albright@caliberkc.com



BECOME YOUR BEST YOU

If you're looking for a place to belong, FPA is here for you. Our community is made up of planners like you who are committed to excellence and are working together to drive the profession forward.

Save \$100 on your first-year of membership when you join now!

Use Code GKC100 at JoinFPA.org for \$100 Off

Discounts for CFP® Professional and Allied Professional memberships only.

2020 BOARD OF DIRECTORS



Chair of the Board

George A. Fernandez, CFP®
Mariner Wealth Advisors



President

Mark A. Albright, CFP®, CRPC®
Caliber Wealth Management



President Elect

Tyler Landes, CFP®, AIF®
Tandem Financial Guidance, LLC



Secretary/Treasurer

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Stepp & Rothwell, Inc.



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Director of NexGen

Jason Newcomer, CFP®
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Kansas State University



Directors at Large

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Mariner Wealth Advisors



Bob Harris, JD, CFP®
Creative Planning



Michael Wren, CFP®
Legacy Financial Strategies, LLC



Chapter Executive

Brandy Johnson, CAE
FPA of Greater Kansas City

NOVEMBER CHAPTER MEETING

November 18, 2020

2:15 - 4:30 p.m.

VIRTUAL



JEFF LANZA

Retired FBI Agent

The World Beyond Words: Understanding the Power of Nonverbal Communication

&

Hoodlums to Hackers: How to Stay Safe from Cyber Crime and Identity Theft

Jeff is a FBI Special Agent who learned the tricks of the criminal mind, uses real life FBI cases to inform, entertain and keep people safe in a world of new and emerging threats. Jeff provides compelling presentations for financial advisors and their clients.

A recent survey of high-net-worth investors have shown that 80% are concerned about the twin problems of identity theft and cyber fraud. Jeff's program aligns perfectly with this concern and offers great value in the category that some advisors like to call "advice beyond investing".

THIS MEETING SPONSORED BY:



Ameritrade

Institutional

Registration:

Members \$15

Non Member \$29

Continuing Education:

CFP® - 2 hours approved

Kansas Insurance - 2 hours approved

Register Today: <https://fpakc.org/event-3668697>



Take 5

October 2020

Dennis Moore, CFP® Elected 2021 FPA President-elect

FPA is [excited to announce](#) that Dennis Moore, CFP® will serve as the 2021 FPA President-elect beginning Jan. 1, 2021. Moore has served in various leadership roles for the association including the FPA of Dallas/Ft. Worth Board of Directors, the OneFPA Advisory Task Force, the FPA Alliance Forum, and as chair for the FPA Pro Bono Committee. FPA is also pleased to welcome George Fernández, CFP®, Lisa Kirchenbauer, CFP®, and Paul Brahim, CFP® who will serve three-year terms on the FPA Board of Directors beginning Jan. 1, 2021.

New Philanthropic Solutions in Financial Planning Certificate Program

To help financial planners guide clients on philanthropic and charitable giving, FPA and the American Heart Association launched a new certificate program, [Philanthropic Solutions in Financial Planning](#). The certificate program explores the benefits of charitable giving and how philanthropic opportunities can be designed to meet long-term client objectives. Financial planners who complete the certificate program will receive membership into the [AHA Professional Advisor Network](#), a digital badge and certificate, and can earn up to six CFP® CE credits. Additionally, eligible participants can join AHA's professional advisor referral program to connect with charitable donors. [Register now.](#)

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.

Diversity & Inclusion: Connect with your FPA Community

FPA strives to create an inclusive culture where diversity is seen as a value of the association to elevate the profession that transforms lives through the power of financial planning. FPA is home to numerous peer-to-peer online learning communities for individuals with a diverse background, or who serve diverse communities. Engage with your peers to learn new perspectives and share ideas. [Explore FPA communities and connect today.](#)

What are your peers learning this month?

Dive deeper into this month's *Journal of Financial Planning* to learn about tax planning, post Covid-19 employee benefits, charitable giving, the science of success, and more. [Check out the October issue of the *Journal of Financial Planning*.](#) And thank you to our proud partner Ryan Insurance Strategy Consultants for powering the October 2020 issue of the *Journal of Financial Planning*.

New research report: The Impending Succession Cliff

Among advisers planning to retire in the next 10 years, 26 percent are unsure of their succession plan. With the right successor, advisers can preserve their legacy and ensure their clients are well-served after they exit the business. FPA invites you to participate in a new, confidential [research study](#) sponsored by [Cerulli Associates](#). For your participation, you will receive a complimentary report based on key findings from Cerulli's latest research update on succession preparation challenges, assessing practice value, and grooming a successor. [Get started!](#)

Take 5 is Brought to You by Ryan Insurance Strategy Consultants

Since 2009, FPA has partnered with Ryan Insurance Strategy Consultants to offer FPA members an industry-leading Long Term Disability plan, and recently launched a group voluntary Term Life plan. They also consult with advisory firms in making insurance product recommendations and their network of advisers are available to help solve more complicated insurance planning issues. Learn more at www.ryan-insurance.net.



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Your Health, Your Plan, Your Choice

Explore your options with FPA Group Health Plans. These customizable plans allow you to control costs while giving your employees plan options that are designed specifically for their needs.

Your FPA Group Health Plan gives you:

- ACA group plans along with alternate funded plan options
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To get a quote, [click here](#) or call (913) 777-7734.

“

“FPA’s group health plan is an incredibly valuable benefit, saving me hundreds of dollars per month. The cost savings more than pays for my membership. It has truly been a game changer for our firm.”

Randy Bruns, CFP® RICP®
Principal / Senior Financial Planner
Model Wealth, Inc.

”



financialplanningassociation.org/fpa-group-health-plan

CHAPTER PLATINUM PARTNERS



American Century
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CHAPTER PARTNERS

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Capital Group/American Funds

Cavanal Hill

First Trust Advisors, L.P.

Mariner Capital Advisors

BRONZE PARTNERS

BlueRock Capital Markets

Janus Henderson

CALENDAR OF EVENTS

November 18, 2020

2:30-5:15 p.m.

Virtual Chapter Meeting

Nonverbal Communication

Cyber Crime & Identity Theft

Jeff Lanza, Retired FBI Agent

Sponsored by: TD Ameritrade Institutional

December 3, 2020

5:00-7:00 p.m.

Virtual NexGen Happy Hour

December 17, 2020

7:30-8:45 a.m.

Virtual Women of FPAGKC Gathering

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

ANNETTE WELLS MEMORIAL SCHOLARSHIP

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.

Who is eligible?

- Undergraduate and certificate students, enrolled in a program at Kansas State University, Rockhurst University, University of Missouri-Kansas City, University of Missouri-Columbia, Missouri Southern State University, University of Kansas, and University of Central Missouri that meets the education requirement for the CERTIFIED FINANCIAL PLANNER™ Certification Examination.
- One scholarship per year may be awarded to a student enrolled in any undergraduate or certificate program that meets the education requirement for the CERTIFIED FINANCIAL PLANNER™ Certification Examination if the applicant is affiliated with a current FPAGKC member through employment, relation, or otherwise.
- Applicants must have a “B” or better overall grade point average
- Applicants must be at least in their junior year of college

If you know of a student that meets this criteria please have them visit <https://fpakc.org/Students> for the application. The deadline is November 30, 2020.