The Newsletter of FPA of Greater Kansas City

News&Views

November 2020

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/
for a full list of available positions.

MESSAGE FROM THE CHAPTER CHAIR

by George A. Fernandez, CFP®

It was 20 years ago that I made the bold leap to become a financial planner, and in that time, I've had the opportunity to sit across the desk from clients as they made the most important decisions in their life along with helping advisors create their own client experiences. While my career path has evolved, there has been one common thread throughout. That is the Financial Planning Association of Greater Kansas City.

Early in my career, a colleague of mine introduced me to the FPA. While my initial involvement started as a member attending meetings, I quickly learned about the power of networking with my peers across the city. I was amazed that while we were technically competitors, we came together to learn and share ideas that helped us grow as professionals and most importantly, helped us serve our clients better. It was this experience that ignited a passion in me about the FPA and ultimately, I dove into board service.

The FPA has provided me with many opportunities to learn and connect. So, it's my hope that many of you who have had this similar experience recognize the importance of FPA and share that importance with the next generation of planners in your office. You've heard me share this many times before but it's so important that we provide our next generation of planners the same opportunity that we had to integrate into the broader financial planning community here in Kansas City.

As you think about your time with the FPA, consider how it has impacted your career. Share your stories and encourage others to consider how they can become involved. For some, it will be as simple as learning together through a virtual or in-person meeting. For others, it will be a first-hand experience volunteering alongside their peers.

As I reflect on 2020, I can't help but think about everything that's occurred this year. Although we were presented with many new challenges, your peers within the FPA were never more than an email, text or phone call away. Our community came together in ways that I wouldn't have imagined a year earlier. Our chapter partners also stepped up in new ways to ensure you knew about the resources available to you and your clients.

As my board service in Kansas City comes to an end, my support and commitment to the FPA of Greater Kansas City continues. As I moved to the FPA National Board, my focus will expand to the broader financial planning community as a whole with the hope that the effects of my participation will be felt in the local communities like those here at the FPA of Greater Kansas City.

Thank you so much for the opportunity to serve you, and I look forward to seeing you again soon.

George A. Fernandez, CFP®
FPAGKC Board Chair

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Brandy Johnson, CAE
FPA of Greater Kansas City

JANUARY CHAPTER MEETING

January 20, 2021
11:45 - 2:00 p.m.
VIRTUAL

CURRENT TAX ISSUES AND PLANNING STRATEGIES IN LIGHT OF THE COVID-19 PANDEMIC, SECURE ACT, AND ELECTION RESULTS

JULIE WELCH (RUNTZ), CPA, PFS CFP®, AEP
Partner/Shareholder, Mera Welch Browne, P.C.

RANDY GARDNER, JD, LLM, MBA, CPA, CFP®, RLP®
Founder, Goals Gap Planning, LLC

LESSONS FROM THE PANDEMIC AND THE VIEW AHEAD

LEILA SHAVER, ESQ.
Founder, My RIA Lawyer

THIS MEETING SPONSORED BY:

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Registration:
Members $15
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Register Today: https://fpakc.org/event-4060391

JANUARY MEETING PREVIEW

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 deadine is November 30, 2020.

DO YOU SEE THE RISK? WE DO.

- *Multiple homes or investment properties*
- *Art, jewelry or fine wine collections*
- *Luxury automobiles*
- *Frequent entertaining*
- *Employing domestic help or occasional workers*
- *Serving on boards of directors*
- *Prominent public profile*
- *Young/teenage drivers*
- *Pool or hot tub*
- *Owning/operating boats, jet skis, ATVs*

The Miller Group has been working with high net-worth families for years to ensure their personal assets are protected appropriately.

When wealth managers add a private risk manager to their tool box, you are building trust and bringing value to your clients. Together, we can help protect what they have built for generations to come.

Call Sarah Askren, PRM
Business Development Manager

E saraha@millercares.com

P 816.308.4560

THE ROBERT E. millergroup

FPA

Take 5

November 2020

FPA Introduces Cybersecurity for Financial Planners: An FPA Certificate Program

To help financial planners protect data and comply with SEC and FINRA requirements, FPA launched **Cybersecurity for Financial Planners: An FPA Certificate Program**. The program, developed in partnership with FCI, guides financial planners through a step-by-step process to establish a customized cybersecurity plan that ensures they are adopting reliable security measures that safeguard client data and provide a record of the firm's cybersecurity practices. Similar to a workshop, those completing the course will receive a digital certificate for accomplishment and have a completed, compliant cybersecurity plan for their firm. CERTIFIED FINANCIAL PLANNER™ professionals completing the entire program will earn 2.5 CFP® CE credits. Register for the certificate program.

What is New at FPA? Check Out the Latest FPA Quarterly 'Snapshot'

FPA is pleased to share the third quarter 2020 'Snapshot' to keep you informed of new FPA membership benefits and activities that support you and the financial planning profession. Each quarter, FPA reports on the most significant developments in member benefits and services in the areas of learn, lead and connect. Access the third quarter 2020 Snapshot now.

What Are Your Peers Learning This Month?

Dive deeper into this month's *Journal of Financial Planning* to learn about advancing diversity and inclusion within the profession, and marketing tools to grow your practice and streamline processes. The *Journal* also explores how to improve your client experience, longevity planning, and more. Check out the November issue of the *Journal of Financial Planning.*

**Thank you to our proud partner Ryan Insurance Strategy Consultants for powering the November 2020 issue of the Journal of Financial Planning.*

Take 5

FPA NexGen® Elects New Leadership

FPA NexGen, a community that supports the advancement of new financial planning professionals, is pleased to announce Amie Agamata, CFP®, ChFC®, RICP® as 2020 Local Leader Coordinator, Kevin R. Clark, CFP®, CIMA® as 2020 President-elect, and Megan Abbott, MBA, MA, EA as 2020 Public Relations Coordinator. Learn more about FPA NexGen.

FPA is Changing Tomorrows™ Through the Power of Pro Bono Financial Planning

In these tumultuous times, FPA chapters and members are committed to ensuring pro bono financial planning is available to those in need. Through their dedication, thousands of individuals and families across the country are getting free, no-strings-attached, financial planning advice to recover from financial strains caused by the pandemic, a cancer diagnosis, or other unexpected life events. Learn how the FPA Pro Bono Program is making an impact.

Do You Want to Get Media Queries in Your Inbox? Be a Part of FPA MediaSource!

Reporters from around the country are sending out media queries to CFP® professional members of FPA each day. This is a great opportunity for FPA members to engage with reporters on upcoming stories and build name recognition and awareness. Want to take part? Simply attend the All-Member Virtual Media Training on Nov. 18 at 4:00 p.m. ET to take the first step in working with the media. Register today!

FPA

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.*

National General | Ryan Insurance | UnitedHealthcare | Humana

financialplanningassociation.org/fpa-group-health-plan

Top 10 Reasons To Join FPA

FPA

1 You're Looking for a Place to Belong

FPA is a receptive, participatory community unlike any other, where you will feel heard, supported and involved.

2 You Want Tools to Grow Your Business

FPA provides access to research, referrals and the latest tools to help you master the business of financial planning through the FPA Coaches Corner, the FPA Research and Practice Institute™, the FPA Job Board and FPA PlannerSearch®.

3 You're a New Planner, and You Need Help

At FPA, we know you're defined by your passion and commitment to your profession, not your generation. From the *FPA Next Generation Planner* app to our bustling online communities, our resources are designed to serve up content and connections for planners just like you.

4 You Want to Make an Impact in Your Community

Did you know FPA has 86 local chapters across the country? When you join, you'll have access to a network of peers—right in your own backyard!

5 You Like Really Good Content—and CE Credit!

FPA is committed to helping you become the best planner you can be. Members have access to relevant, quality content in webinars, newsletters, blogs, the *FPA Next Generation Planner* app and the *Journal of Financial Planning*.

6 You're an Experienced Planner and Want to Give Back

Consider joining FPA to guide young planners to success through mentorship. It's your chance to inspire—and be inspired by—the next generation of our profession.

7 You Like Saving Money

FPA members have access to over 20 reduced price products and services through the FPA Member Discount Program.

8 You're Ready to Get Yourself Out There...But You've Never Done It Before

FPA can help you become a 'go-to' expert source on financial planning issues with free media training and FPA MediaSource (our platform to connect you with local and national media).

9 You Want to Connect with Your Peers and Grow Professionally

FPA has engaging year-round events tailored to fit your needs. Join our community and get exclusive member-only discounts on registration.

10 You Want to Make a Genuine Difference in Your Profession

FPA gives you a platform to do just that—we make it easy to get involved in your community through legislative efforts, pro bono planning, media training, article contributions and more.

Save 15% When You Join FPA by November 30

FINANCIALPLANNINGASSOCIATION.ORG/FPA-MEMBERSHIP-DRIVE

CHAPTER PLATINUM PARTNERS

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First Trust Advisors, L.P.

Mariner Capital Advisors

BRONZE PARTNERS

BlueRock Capital Markets

Janus Henderson

CALENDAR OF EVENTS

December 3, 2020
5:00-7:00 p.m.
Virtual NexGen Happy Hour

December 15, 2020
5:00-6:00 p.m.
Virtual Partner Sponsored Roundtable and Wine Tasting
Passion Assets: The Share or Save
Sponsored by: The Miller Group
Please watch your email for details and registration informatiom

December 17, 2020
7:30-8:45 a.m.
Virtual Women of FPAGKC Gathering

January 20, 2021
11:45 a.m.-2:00 p.m.
Virtual Chapter Meeting
Current Tax Issues and Planning Strategies in light of the COVID-19 Pandemic, SECURE Act, and Election Results
Julie A. Welch (Runtz), CPA, PFS CFP®, AEP and Randy Gardner, JD, LLM, MBA, CPA, CFP®, RLP®
Lessons from the Pandemic and the View Ahead
Leila Shaver, Esq.

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

WELCOME NEW MEMBERS

Jason Kane, CFP®

MEMBER MILESTONES

Jim DeJulio, CLU ChFC AAMS AWMA-5
JoAnn Huber, CFP®-5
Raymond Hyson, MPAS® CRPC®-5
Nick Kendall-5
Gretchen K. Cliburn, CFP®, CDFA™-10
Ryan K. Noble, CFP®-10
Angela Robinson, CLF, CRPS®-10

James R. Cook, CFP®-15
Stephanie L. Guerin, CFP®-20
Debra A. Clayton, CFP®-25
Sandi Weaver, CFP®, CPA, CFA-25
Julie A. Welch, CFP®, CPA-25
Risdan D. Kasper, CFP®-35
Dean W. Young, MS, CFP®, CRPS®-35