The Newsletter of FPA of Greater Kansas City

News&Views

December 2020

FPA

FINANCIAL PLANNING ASSOCIATION

GREATER KANSAS CITY

IN THIS ISSUE:

FPA of Greater Kansas City

PO Box 4303
Topeka, Kansas 66604
(303) 867-7181
BJohnson@OneFPA.org
www.fpakc.org

CAREER LISTINGS

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

MESSAGE FROM THE PRESIDENT

by Mark A. Albright, CFP®, CRPC®

Hello all,

Well congratulations, looks like we made it! It has been a trying year for sure, but in spite of the challenges, I feel great about what we have accomplished.

I truly appreciate everyone's involvement over the course of the year. Thank you to all who chose to look for the opportunities amid the uncertainty instead of using it as an excuse to mail it in.

Specifically, I would like to thank the members of our board. They did an incredible job navigating a difficult environment and leaving our chapter in better shape at the end of the year than the beginning. Membership has been steady, partners have remained committed, and we have managed the finances of the chapter prudently to allow for flexibility in keeping member costs affordable.

Our chapter executive, Brandy Johnson, has done a phenomenal job in coordinating all this change and has been instrumental behind the scenes as part of our involvement as a OneFPA Beta Test Chapter. She is a valuable resource, and we are grateful to have her back.

We have attempted to use this year to try some new ways to connect with members and add value wherever possible. Some of these learnings, such as our virtual meetings are sure to have a lasting impact. That said, we are certainly anxious to get back in person and are hoping to kick that off with a larger flagship symposium in the summer.

Next year, Tyler Landes will be taking over as President and we have some fresh faces on the board who are eager to keep things moving forward. Planning is well under way for a new revamped schedule of events and we are looking to make it easier to plug into other opportunities that allow you to make the most of your FPA membership.

In any one of our FPA chapter meetings, there is a tremendous collection of talented individuals who possess significant experience in our industry. There is so much we can learn from each other and that culture of support is something that we want to ensure exists in our community for a long time. Every member of our chapter contributes a unique and valuable perspective, and we're glad that you're here.

Best wishes to all for a safe and healthy holiday season, looking forward to seeing everyone for a fresh start in the new year!

Mark A. Albright, CFP®, CRPC®
FPAGKC 2020 President

WELCOME NEW MEMBERS

Jesse Bunse, CFP®

MEMBER MILESTONES

Roderic C. Russell, CFP®-10 years
Risdan D. Kasper, CFP®-35 years

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
Todd C. Ericson, CFP®
Stepp & Rothwell, Inc.

Director of Community Outreach
Allison Becker, CFP®
Mana Financial Life Design

Director of Government Relations
Cole K. Foster, CFP®

Director of Membership
Carrie Ohm, CPFA
Resources

Director of NexGen
Jason Newcomer, CFP®
Barber Financial Group

Director of Partnerships
Jeffrey Hrabe, CMFC®
Cavanal Hill Distributors Inc.

Director of Programs
Ben Skilling, CFP®
Waddell & Reed

Director of Public Awareness
Jamie A. Bosse, CFP®, RFC
Aspyre Wealth Partners

Directors of Student Mentoring and Career Development

Mary Dorn, MBA
University of Missouri

Derek Lawson, Ph.D., CFP®
Kansas State University

Directors at Large

Jack Giardino, CFP®
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

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, Meara 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:

American Century Investments®

LearningQuest® 529 Education Savings Program

Registration:
Members $15
Non Member $29

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

Register Today: https://fpakc.org/event-4060391

FPA

Take 5

December 2020

New FPA Certificate Programs on Philanthropic Solutions and Cybersecurity

FPA recently launched two certificate programs to help financial planners with philanthropic solutions and cybersecurity. In partnership with the American Heart Association, Philanthropic Solutions in Financial Planning, explores the benefits of charitable giving and how philanthropic opportunities can be designed to meet long-term client objectives. Developed with FCI, Cybersecurity for Financial Planners, guides planners through a step-by-step process to establish a customized cybersecurity plan that helps them adopt reliable security measures that safeguard client data and provide a record of the firm's cybersecurity practices. Participants receive a digital certificate and earn CFP® CE credits upon completion of each program. Register now.

Miss the FPA Digital Annual Conference? Get a Peek at Some of the Most Popular Sessions

If you weren't able to join us virtually for the FPA Annual Conference this year, you're in luck! We're excited to share the FPA Digital Annual Conference 2020 Rebroadcast Lineup featuring top speakers and up to 4 CFP® CE credits through the end of the month. Take advantage of special live rebroadcast pricing (a savings of $10 for members and nonmembers). Access today. Plus, all on-demand conference recordings are available now!

What Are Your Peers Learning This Month?

Dive deeper into this month's *Journal of Financial Planning* to learn about the future of financial planning post Covid-19, the financial planning career path of the future, choosing a business model to fit the evolving needs of your business and clients, tax planning for Coronavirus-related distributions, the importance and impact of recruiting and serving Black and Latinx financial planning professionals, and more. Check out the December issue of the *Journal of Financial Planning*.

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

FPA SmartBrief: Stay Up-To-Date on Trends in the Profession

FPA, in partnership with SmartBrief, is excited to offer members *FPA SmartBrief*. With a unique focus on key trends affecting the financial planning profession, this e-newsletter will provide you with the news you need to stay informed. Learn why thousands of financial professionals trust *FPA SmartBrief* to provide up-to-date information about the practice and profession of financial planning. Subscribe for free.

Help those in need discover the power of financial planning

Now more than ever, American families seek financial guidance to recover from economic hardships and achieve financial stability. Through the Foundation for Financial Planning's generous support, FPA and its chapters offer pro bono financial planning programs in communities nationwide to help underserved and at-risk populations discover the power of financial planning. In fact, more than 90% of the Foundation's grant funding supported FPA and community partners of FPA chapters this year. Donate today to help the Foundation and FPA continue bringing hope and optimism to thousands of families who need it most.

Dynamic Income: The Missing Piece of the Retirement Income Puzzle

Award-winning retirement income expert Wade Pfau, Ph.D., CFA, RICP® takes a deep dive into how Prudential's breakthrough annuity benefit can help reduce the impact of "sequence-of-returns" on retirement income—and boosts the probability of retirement plan success. Read more.

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
- Custom group health plans with different co-pays and deductibles
- Deductible credit for the same calendar year
- Available short-term medical plans, medi-gap products and HSA plans

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

CHAPTER PLATINUM PARTNERS

American Century Investments®

LearningQuest®
529 Education Savings Program

creative1ne
diversified financial services

Greater Kansas City Community Foundation℠

FAIRWAY®
INDEPENDENT MORTGAGE CORPORATION
NMLS#2289

Reverse Mortgage Planner

TD Ameritrade
Institutional

THE
TIFIN
GROUP

CHAPTER PARTNERS

GOLD PARTNERS

THE ROBERT E. millergroup

WADDELL & REED Financial Advisors®

WELLS FARGO HOME MORTGAGE

SILVER PARTNERS

Ash Brokerage

Capital Group/American Funds

Cavanal Hill

First Trust Advisors, L.P.

Mariner Capital Advisors

BRONZE PARTNERS

BlueRock Capital Markets

Janus Henderson

CALENDAR OF EVENTS

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.

March 17, 2021
11:45 a.m.-2:00 p.m.
Virtual Chapter Meeting
Economic Update
Chris Kuehl, PhD, Managing Director, Armada Corporate Intelligence
Second Session TBA

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