



The Newsletter of FPA of Greater Kansas City

# News & Views

February 2020

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## FPA of Greater Kansas City

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# MESSAGE FROM THE CHAIR

by George Fernandez, CFP®

News Alert – The Great Wealth Transfer is happening now! Certainly, you’ve heard this before and no doubt we’ll continue to hear about it for another couple of decades. Depending upon your source, there is said to be nearly \$30 trillion that will change hands. While this transition is inevitable and will create unprecedented liquidity events for a large number of folks, there is another transition that is also taking place that doesn’t receive as much attention.

That is the transfer of knowledge. You’ve heard me share this before, but in our industry, the transfer of relevant knowledge is one of the key generational values we have to transfer. To add to that challenge, we’re also going to experience one of the greatest generational communication challenges in history, too.

Think about it, for the first time in history there could be 4 (maybe even 5) distinct generations working alongside one another. Each with their own communication style and career expectations. From Generation Z to the Baby Boomers, each generation will impact how we transfer our professional knowledge.

The technical knowledge will be the easiest to pass along. Through licensing, certifications, degree programs, FPA meetings, etc., technical knowledge will be readily accessible.

Simple, right? While the application of that knowledge will come through experience, it will need to adapt to the kind of experience that is relevant today. There is a stark contrast to the way many of us started in the business 20 years ago as compared to

today. Not only have rules of engagement changed, but so have our clients’ expectations.

Given these new challenges, how will you embrace the next generation of advisor? What will your expectation be of them? Will you require them to pay their dues, like you did? Will you accept the 80% dropout rate within 5 years like our predecessors did?

I believe there is another way. And I’ve seen it work! Consider this. What if you created a different experience such as establishing an apprenticeship and/or mentor program? Providing them a career path that engages their intellect, professional curiosity, empowers their strengths, and develops their interpersonal communication skills.

While this approach is not as widely used, it does hold promise to build financial planning skills unlike ever before. By combining the application of technical skills and developing their communication skills through apprenticeship and mentor programs, the next generation will have the opportunity to grow into very competent financial planners.

I’ve seen this approach in action and invite to you to reach out to me if you’d like to learn more about it. FPA has many resources to leverage as do many of your peers.

**George Fernandez, CFP®**  
FPAGKC Chair of the Board  
Mariner Wealth Advisors



## CAREER LISTINGS

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



# 2020 BOARD OF DIRECTORS



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Tandem Financial Guidance, LLC



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## **Chapter Executive**

Brandy Johnson, CAE  
FPA of Greater Kansas City

# EMPATHY IS AT THE CENTER OF FPA ADVOCACY IN 2020

Excerpted from [Empathy is at the Center of FPA Advocacy in 2020](#)

by Martin Seay (InvestmentNews, Feb. 25, 2020)

Samantha Power, the former U.S. ambassador to the United Nations, once said, “All advocacy is, at its core, an exercise in empathy.” Empathy has power. It unites like-minded individuals who share a common belief and purpose because it means those engaged in the advocacy process understand each other, the challenges they face, and the opportunities that are collectively embraced to elevate something bigger than themselves.

We see the power of empathy every day at the Financial Planning Association through our members who call FPA their professional home. They are professionals of varying backgrounds and business models, all united by a common commitment to the financial planning profession and a calling to serve their clients without compromise. It is through this empathy and their willingness to engage in the advocacy process that we are having an impact in advocating for an established profession that transforms lives through the power of financial planning.

FPA’s advocacy vision and policy is to champion financial planning that’s delivered under a fiduciary standard of care. We further believe that financial planning — as an honorable profession — should be recognized in law and by the public based on

the certified financial planner marks and practiced by professionals who are required to adhere to the standards that the CFP marks represent. This policy focuses our association’s advocacy priorities, strategies and how we direct our resources.

Through the generous support and action of members, the FPA Political Action Committee has opened doors to federal lawmakers to ensure financial planners are heard as policies are formed. FPA members who travel to Washington and to state capitols across the country for advocacy days are meeting with lawmakers to make the financial planning profession known while advocating for important measures that will elevate the profession and serve the public well.

In 2019 alone, our members’ efforts helped shape policies that protect vulnerable adults from financial exploitation in Arizona and New Hampshire, protect the ability of CFP professionals to use the marks in Louisiana, amplified the importance of a fiduciary standard of care in New Jersey and Massachusetts, and ensured the voices of financial planners were heard when the SEC passed Regulation Best Interest, which we continue to work on to this day.

To read the full article visit: [www.investmentnews.com](http://www.investmentnews.com)



## SHARE FPA MEMBERSHIP

Our community is made up of planners like you who are committed to excellence and are working together to drive the profession forward.

Invite someone to join today and they'll receive \$100 off their first-year of membership!

**Use Code GKC100 at [JoinFPA.org](http://JoinFPA.org) for \$100 Off**

Discounts for CFP® Professional and Allied Professional memberships only.

**FPA** OF GREATER KANSAS CITY  
FINANCIAL PLANNING ASSOCIATION

# MARCH CHAPTER MEETING

**March 25, 2020**

11:30 a.m. - 2:00 p.m.

Embassy Suites Hotel & Convention Center

10401 S. Ridgeview Rd, Olathe, KS 66061

## U.S. ECONOMIC OUTLOOK 2020 AND BEYOND



**WILLIAM B. GREINER, CFA**

*Chief Economist, Mariner Wealth Advisors*

## SECURE ACT: CHANGE & OPPORTUNITY



**DENNIS MATTERN**

*VP, Training & Development, CreativeOne*



**ANDREW PAYNE**

*VP, General Counsel, CreativeOne*

THIS MEETING SPONSORED BY:



Register Today: <https://fpakc.org/event-3668662>

# A WORD FROM OUR PLATINUM PARTNER



**Rob Hagg**  
Executive Vice President,  
Sales-Life and Integrated Financial Services

**See pages 8-12**

A promotional banner for the FPA Retreat 2020. The background is a green and yellow abstract design with a map-like pattern. On the left, there is a black box with the FPA logo (Financial Planning Association) and the word "RETREAT" below it. Below that is a yellow box with the year "2020" and a white flame icon. In the center, the text "MAY 4-7, 2020 | CEDAR CREEK, TX" is displayed in white. Below this, the main headline "LEARN TOGETHER AND LEAD AS ONE AT FPA RETREAT 2020" is written in large, bold, white and yellow letters. At the bottom right, a yellow box contains the website "FPARETREAT.ORG" in white capital letters.



# MEET CREATIVEONE

**At first, you might think CreativeOne is just an independent marketing organization, but we're more than meets the eye.**

If you look closely, we're an industry-leading diversified financial services organization focused on **annuities**, **life insurance** and **investment services**.

Since 1984, we've provided five-star solutions, and every step of the way we've anticipated regulatory change. Today, our 140+ employees accommodate thousands of insurance and financial professionals nationwide by providing exclusive products, trendsetting lead-generation tactics and innovative marketing. Additionally, we pride ourselves on product development, having created more than 60 fixed indexed annuities. We don't simply follow industry best practices—we set them.

CreativeOne can fulfill many needs to help you evolve your business. The people who make up this organization have roots in the industry you've never experienced before. We promise to always advocate on your behalf, ensuring you have the tools needed to help your clients protect their financial futures.



As a platinum sponsor of Financial Professional Association of Greater Kansas City (FPAGKC), we invite you to learn more about where we've been and where we're going here: **[go.creativeone.com/belongcreativeone](https://go.creativeone.com/belongcreativeone)**







# The SECURE Act

**The Setting Every Community Up for Retirement Enhancement Act of 2019, better known as the SECURE Act, which originally passed the House in May of 2019, was approved by the Senate on December 19, 2019.**

This is part of an end-of-year appropriations act and accompanying tax measure, and signed into law on December 20, 2019 by President Donald Trump. The bill includes significant provisions aimed at increasing access to tax-advantaged accounts and preventing older Americans from outliving their assets.

There are a few key provisions regarding Required Minimum Distributions and inherited IRAs that should be considered.

## **The Age for Required Minimum Distributions Has Increased**

The age at which retirement plan participants need to take their RMDs has been pushed back from 70 1/2 to 72. Individuals who turn 70 1/2 on 1/1/2020 or later will not have to begin taking RMDs until April of the year following the year in which they turn 72. Individuals who have turned 70 1/2 prior to the end of 2019 are not affected.



## **Examples**

**Mary's birthday is July 20th and she turns 70 1/2 on January 20, 2020. Will she need to take RMDs in 2020?**

No, because Mary turned 70 1/2 after the start of 2020, she will not need to take RMDs until April of the year after she turns 72. Mary will turn 72 on July 20th of 2021. She will need to begin taking RMDs by April of 2022.

**Mark's birthday is June 20th and he turned 70 1/2 on December 20, 2019. Will he need to take RMDs in 2020?**

Yes, because Mark turned 70 1/2 before the end of 2019, he will need to take his first RMD by April of 2020, the year after the one in which he turned 70 1/2.



### Stretch IRAs have been Curtailed

A Stretch IRA is an estate planning strategy that extends the tax-deferred status of an inherited IRA when passed on to a non-spouse beneficiary. Prior to the SECURE Act, a non-spouse beneficiary of an IRA could stretch out distributions from the account for the remainder of his or her life. The SECURE Act has eliminated this ability unless certain exceptions are met.

Under the new rules of the SECURE Act, non-spouse beneficiaries of an inherited IRA are required to withdraw the balance of the account within 10 years. The clock begins on January 1st the year after which the original IRA account owner passes away. The distributions can be taken with any frequency. The balance can be withdrawn all at once in the first year or all at once in the last year. Distributions can be sporadically taken out over the 10 years. The account must be zeroed out at the end of the 10-year period.

The SECURE Act is effective for those who have inherited an account with which the account owner passed away after the end of 2019. The SECURE Act does not affect spouses.

### Annuities inside 401(k) Plans

The SECURE Act includes provisions modifying and streamlining compliance requirements for offering an annuity option inside certain employer-sponsored retirement plans.

This means new annuity options may begin to be offered in employer plans in addition to options commonly available prior to the Act. This will enhance access to lifetime income for retirement savers.



## Examples

**Steve recently inherited an IRA from his father. His father passed away on January 2, 2020.**

**The IRA has an account balance of \$500,000. Can Steve stretch the distributions out to receive them for the remainder of his life?**

No. Because Steve's father passed away after the start of 2020, Steve is subject to the new rules in the SECURE Act. Steve must withdraw the IRA account balance to zero within 10 years starting on January first in the year after which his father passes away (2021). The IRA account balance must be zero by the end of 2030. He can take all \$500,000 out immediately, all of it in 2030, or any amounts during the years between as long as there is nothing in the account at the end of 2030.

**Stephanie recently inherited an IRA from her grandmother. Her grandmother passed away on December 14, 2019. The IRA has an account balance of \$500,000. Can Stephanie stretch the distributions out to receive them for the remainder of her life?**

Yes. Because Stephanie's grandmother passes away before the end of 2019, she can utilize the Stretch IRA strategy. Stephanie can take RMDs from the account based on her life expectancy.

*If a non-spouse beneficiary has already been using a Stretch IRA strategy prior to the end of 2019, they may continue to do so.*



Additionally:

- The Act includes a provision allowing for the rollover to an IRA of a workplace annuity option if the sponsor no longer offers the guaranteed income product and/or annuity.
- Plan sponsors will be required to include a new lifetime income disclosure illustrating a plan participants monthly payment if they utilized a stream of lifetime income.

## Estate planning tips for those with large IRA balances

### Insurance

For a Traditional IRA account holder who is subject to Required Minimum Distributions, the life insurance approach is one way to ease the tax burden for their non-spousal beneficiaries. If the account holder does not need the RMD withdrawals for expenses, they can take a portion of the RMD and use it to pay the premium of a life insurance policy and name their non-spousal IRA beneficiary as the beneficiary of the death benefit on the life insurance policy. When the account holder passes away, the death benefit is paid tax-free to the beneficiary.

### Roth Conversion

Roth conversion strategy is one method that they can use to ease the future tax burden on their non-spouse beneficiary. The account owner would have to pay the taxes now (on the amount converted), but those assets would then be passed along to the beneficiaries via a Roth IRA instead of a Traditional IRA. The beneficiary would then be able to withdraw those funds tax-free.

### Charity

For IRA account owners over the age of 70 1/2 (this age did not change with the SECURE Act), they can maximize their annual charitable contributions. These qualified charitable distributions (QDC) are excluded from the account owner's taxable income and they will also lower the value of the taxable IRA when it is passed on to their non-spousal beneficiary.

For IRA account owners who would like to support the non-spouse beneficiary while also benefiting a charity, a charitable remainder trust may be a good option. The IRA account owner can create and fund a trust that will be funded with the IRA's assets after the account owner's death. The trust can then create a regular income stream for the non-spousal beneficiary that can be distributed over a certain amount of time or the beneficiary's lifetime. The assets are only taxed when they are withdrawn. When the beneficiary passes away, the remaining assets in the IRA will be distributed to the designated charity.



## Example

**Roth Conversion:** This is especially important for account owners with large IRA balances. Dave has an IRA with an account value of \$1,000,000. He has named his 32-year-old son, John, as beneficiary. If Dave were to pass away in 2020, John would inherit the IRA and must withdraw the \$1,000,000 within the next 10 years. Those withdrawals will be added to his taxable income each year likely pushing him into the next tax bracket.

If Dave decides to gradually convert his Traditional IRA into a Roth IRA, he will pass the converted dollars on to John in a vehicle that allows John to withdraw the money tax-free. Thus, not adding taxable income.







### Other provisions in the SECURE Act

- IRA contributions can now be made after the age of 70 1/2. As long as they are still working, employees can contribute to their own or their spouse's IRA after they've reached the age of 70 1/2.
- Long-term, part-time workers are now able to join their company's 401(k) plan. Employees that work over 1,000 hours in one year, or over 500 hours in 3 consecutive years are now able to participate in their employers 401(k) plan.
- Small business employers (100 employees or less) will receive a maximum tax credit of \$5,000 (\$250/non-highly compensated employee) when they establish a retirement plan. If the retirement plan has automatic enrollment, an additional \$500 tax credit is available.
- Account owners are able to withdraw up to \$5,000/parent penalty free from their retirement plan upon the birth or adoption of a child. This will be free from the 10% early withdrawal penalty but will still be subject to ordinary income taxes.
- 529 plan funds can be used to pay down student loan debt.
- Small-business owners can now more easily establish multiple employer plans (MEPs) by allowing unrelated employers to join together in the creation of a plan. The employers no longer have to be related by common ownership or by being in the same industry among other options.



If you have questions on how the SECURE Act will affect your financial situation, please do not hesitate to reach out to a financial professional.

Source: <https://www.congress.gov/bill/116th-congress/house-bill/1994/text>

# COMMITTEE FEATURE: COMMUNITY OUTREACH

by Allison Becker

As an organization full of financial planners, we are hyperaware of the value of time. Our time is even more valued and appreciated by the Kansas City metro area. For this reason, we are known as the resource for various volunteer opportunities. It is a compliment to be the resource for these volunteer opportunities, and in order to fulfill these activities we need FPA members to gift their time to the community.

Previous volunteer opportunities include one-on-one pro bono financial planning, presentations to community organizations on requested financial topics, career development for local high schools, and more. To learn more about current and future volunteer opportunities, please email me.



**Allison Becker**

FPAGKC Director of Community Outreach  
Legacy Financial Strategies, LLC  
allison.becker@legacykc.com

## OneFPA BETA CHAPTER UPDATE



Chapter Executive Brandy Johnson attended the OneFPA Beta-Test chapter meeting in Denver, Colorado on January 22-23, 2020. Chapter Executives from the 11 beta-test chapters attended the two-day training where they collaborated with national staff and conversed on the core areas of the OneFPA Network.

For more on the OneFPA initiative please visit:  
[www.OneFPANetwork.org](http://www.OneFPANetwork.org).

## WELCOME NEW MEMBERS

Michael Eugene Brun, Jr.  
Matthew Robert Morgan Charles, CFP®  
Garrett Harper  
Beth Hendricks  
Jordan M. O'Grady, CFA, CFP®  
Emma von Weise

## MEMBER MILESTONES

Clint Haynes, CFP®-5 years  
Alexander Petrovic, III, CFP®-5 years  
Timothy Rodgers, CFP®-5 years



### Last Call! Gain Access to Long-Term Disability Insurance

FPA members are eligible to participate in a special Open Enrollment period for [Group Long-Term Disability Insurance](#), offered in partnership by FPA and Ryan Insurance Strategy Consultants. Until Feb. 21, 2020, members are guaranteed acceptance\* for LTD coverage. That means you, as an FPA member, will be accepted regardless of your medical history (no medical questions or records required). [Take advantage of these savings today!](#)

\*Not applicable if medical history has been provided to Standard Insurance Company in the past and coverage has been declined.

### Teresa Riccobuono Joins the FPA Coaches Corner as the Client Experience Coach

Teresa Riccobuono can help you define how you want your client interactions to look and feel, developing that perfect client experience. FPA members can [access free resources and exclusive discounts](#) on additional services from Teresa.

### Create Success for Today, Tomorrow and 2030

Change can seemingly arrive in leaps and bounds, but the truth is that the incremental changes we make today will set up our businesses for success in 2020 and lay the groundwork for relevance in 2030. We asked the eight business coaches of the [FPA Coaches Corner](#) to offer their advice on what can be done today to begin laying the groundwork for meaningful long-term innovation. Read [Action 2020: Create Business Success for Today and Tomorrow](#) and power up your business today!

### Catch Up on CFP Board's New Code of Ethics and Standards

Designed to educate planners on CFP Board's new *Code of Ethics and Standards of Conduct* that are now in effect, this course is a don't miss for CFP® professionals. Learning objectives include how to apply the Practice Standards when providing financial planning, identify the structure and content of the revised Code and Standards, recognize situations when specific information must be provided to a client, how to act in compliance with CFP Board's fiduciary duty and how to fully disclose and manage conflicts of interest. Move through our interactive self-paced course for \$79 or join one of our upcoming, engaging live instructor-led webinars discounted for members at \$99. Earn two (2) CFP® CE credits. [Register now.](#)

### Better Than a Box of Chocolates: FPA Retreat 2020 Early Bird Pricing Extended!

FPA Retreat has long served as an incubator for knowledge sharing, ideation and fostering of perspectives. Our #FPAretreat20 keynote speakers continue in this tradition – Austin Channing Brown and Ashton Applewhite have us looking forward to May! With this exciting speaker line up, we're pleased to announce FPA Retreat 2020 early bird pricing has been extended to Feb. 14. Join us this spring at the Hyatt Regency Lost Pines Resort for FPA Retreat 2020 to sharpen your professional knowledge, build your leadership skills and connect with your planning peers in Cedar Creek, Texas. [Register now](#) and save \$200 with early bird pricing!

### Enrich Your Career with a Financial Planners Journey to South Africa in 2020

Financial planning is truly a global profession, so take some time in 2020 to join an adventure of a lifetime to South Africa to explore how financial planning is delivered. From Nov. 9–19, 2020, join Dan Moisand, CFP®, Nick Nicolette, CFP® and a select group of U.S. financial planners on a journey to gain a better understanding of the practice of personal financial planning and the development of the financial planning profession in South Africa, through conversation with local financial planners. And of course there will be plenty of time to explore Johannesburg, Cape Town and many of the sites that make South Africa a one-of-a-kind destination. [Learn more and register!](#)

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**RYAN INSURANCE**  
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"Protecting Your Financial Plans Since 1978"  
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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](http://www.ryan-insurance.net).





# FPA Group Health Plan

## DISCOVER FPA'S MEMBER-ONLY HEALTH PLAN

FPA is proud to be one of the first to market with a national† group health plan exclusively for members, their employees, and their families! Now is your chance to control costs while giving your employees plan options designed specifically for their needs.

- Level premium self-funded plans for groups of 2-50 (medical underwriting required)
- Rates approximately 25%\*\* lower than comparable Affordable Care Act (ACA) plans
- Customized group health plans with different co-pays and deductibles are accessible
- Short-term medical plans, medi-gap products and HSA plans are also available

## GETTING STARTED

Visit the [FPA Group Health Plan website](#) or call Broker Source\*\*\* at 913-333-3381 for additional information about this FPA member-only group health plan and to [GET A QUOTE](#).

If you have any questions, please reach out to FPA Member Services at 800.322.4237 option 2 or [MemberServices@OneFPA.org](mailto:MemberServices@OneFPA.org).

"We saved thousands of dollars on a plan that's almost the same as our old one. I was surprised by how easy the process was. Ryan Insurance took care of all the setup and answered my questions right away. I've already recommended them to a colleague at another firm."

—Christine Damico, Director of Human Capital



† Due to individual state regulations, plans not yet available in DE, HI, MT, NC, NH, NY, and DC.

\* National General Benefits Solutions, incorporated in 1965, focuses on providing small- and mid-sized employers with benefits options previously only available to large employers – helping employers lower costs while providing quality benefits to their employees. Rated A- (Excellent) by A.M. Best.

\*\* Potential savings based on standard level premium self-funded plan rates compared to similar ACA rated products.

\*\*\* Broker Source has been selected by Ryan Insurance Strategy Consultants to provide the administration for the FPA Group Health Plans.

National General >>



# CHAPTER PLATINUM PARTNERS



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diversified financial services

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COMMUNITY FOUNDATION<sup>SM</sup>



**FAIRWAY**®  
INDEPENDENT MORTGAGE CORPORATION  
NMLS#2289



**Ameritrade**  
Institutional

# CHAPTER PARTNERS

## GOLD PARTNERS



**WELLS  
FARGO**

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## 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

**March 5, 2020**

**NexGen Roundtable Discussion (members only)**

**March 25, 2020**

11:30 a.m.-2:00 p.m.

**Chapter Meeting**

**Economic Update**

William Greiner, CFA, Chief Economist, Mariner Wealth Advisors

**SECURE Act**

Dennis Mattern and Andrew Payne, CreativeOne Embassy Suites, Olathe

**April 2, 2020**

5:00-7:00 p.m.

**NexGen Happy Hour**

**April 23, 2020**

4:30-6:00 p.m.

**Women of FPAGKC Gathering**

Nathan Astle, Financial Therapy Association  
Johnny's Tavern, 6765 W 119th St, Overland Park

**May 7, 2020**

5:00-7:00 p.m.

**NexGen Happy Hour**

**May 20, 2020**

2:30-5:15 p.m.

**Ethics Chapter Meeting and Reception**

Ann Coulson  
Embassy Suites, Olathe

**May 20, 2020**

**New Member Reception and Volunteer Fair**

Following chapter meeting

**June 4, 2020**

**NexGen Roundtable Discussion (members only)**

**June 18, 2020**

7:30-8:45 a.m.

**Women of FPAGKC Gathering**

Solissa McKay, Sol Impact Consulting

**July 2, 2020**

5:00-7:00 p.m.

**NexGen Happy Hour**

**August 6, 2020**

5:00-7:00 p.m.

**NexGen Happy Hour**

**August 26, 2020**

11:30 a.m.-2:00 p.m.

**Chapter Meeting**

Greg Valliere  
Embassy Suites, Olathe

**September 3, 2020**

**NexGen Roundtable Discussion (members only)**

**September 24, 2020**

4:30-6:00 p.m.

**Women of FPAGKC Gathering**

Courtney Thomas, CEO of Newhouse  
Harmony in the Hustle | Turning Competing Priorities into Success  
Johnny's Tavern, 6765 W 119th St, Overland Park

**September 25, 2020**

**Greater Kansas City Foundation & Mariner Capital Advisors Sponsored Roundtable (members only)**

**October 1, 2020**

5:00-7:00 p.m.

**NexGen Happy Hour**

**October 21, 2020**

2:30-5:15 p.m.

**Chapter Meeting**

Michael Finke  
Embassy Suites, Olathe

**November 5, 2020**

5:00-7:00 p.m.

**NexGen Happy Hour**

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