The Newsletter of FPA of Greater Kansas City

News&Views

March 2020

Hello Spring!

FPA® FINANCIAL PLANNING ASSOCIATION OF GREATER KANSAS CITY

IN THIS ISSUE:

CAREER LISTINGS

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

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MESSAGE FROM THE PRESIDENT

Mark A. Albright, CFP®, CRPC®

Well, this year has been an adventure so far and we are only through the 1st quarter. I am sure you have all had your hands full managing a remote working environment while guiding clients through this uncharted territory. These are the times when clients need us most though, and the FPA wants to help support you as you navigate this rapidly changing environment.

As you know, we are working to reschedule our March chapter meeting and are evaluating options for how best to handle our events over the next few months. We are considering all options including virtual meetings. In making these decisions we want to be mindful as to the effect on all involved. This includes our members, sponsors, speakers, and venue. The board will be sure to communicate these updates as they develop. We ask that you remain flexible with us as this is far from a normal operating environment.

In addition, FPA National has been offering resources to assist with the decisions you are making at the practice level. Be sure to keep an eye on their email communications and on the FPA Connect message boards to help provide some perspective on how other practices across the country are providing service to their clients.

Should you have any feedback or suggestions please don't hesitate to reach out to me directly or any member of the board.

Stay safe and healthy and we look forward to collaborating with you all again soon.

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

CHAPTER EVENT HIGHLIGHTS

Great turnout for the Women of FPA Gathering featuring Lauren Conaway, CEO, InnovateHER KC on February 27.

FPA staff and members at Missouri Advocacy Day. Pictured from left to right: Karen Nystrom (FPA National), Alan Robbins (FPA St. Louis), MO State Representative Tracy McCreery, Rodney Loesch (FPAGKC), and Cole Foster (FPAGKC).

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FPA INFORMATION AND RESOURCES FOR MEMBERS DURING COVID-19

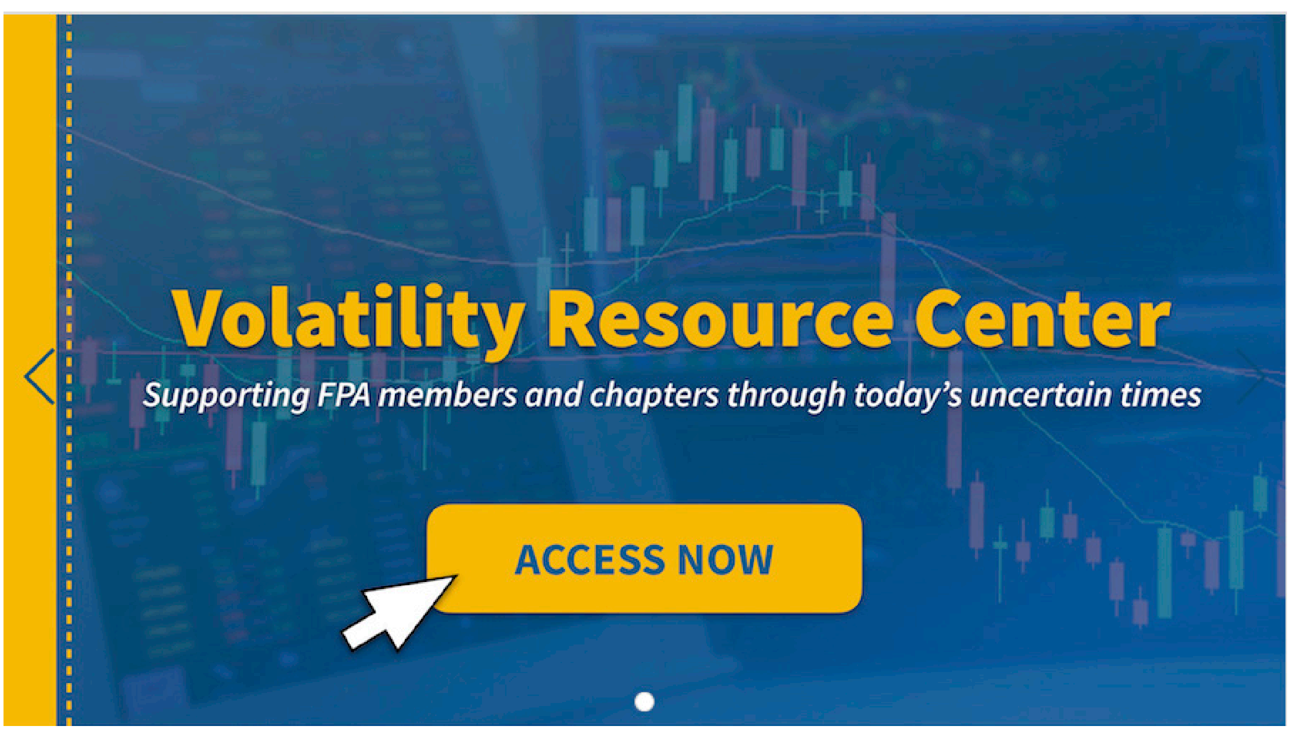
We serve the entire financial planning community and want to be sure our members can easily access information that will help you serve your clients during these difficult times. The FPA Volatility Resource Center (see link below) has been created to provide members with content from the Journal of Financial Planning, the FPA Practice Management Blog, partners, coaches and others. There are also helpful links to the CDC with the latest information on the outbreak. We are also offering a variety of resources for nonmembers in this area, as we work to ensure that all financial planners have what they need to guide clients through this situation. This page will be updated often, so keep the page bookmarked.

FPA recently launched an online community called Navigating Market Turbulence Related to the Coronavirus where you can connect with your FPA peers through a hosted series of virtual discussions about best practices on supporting clients and access a curated library of content from the Journal of Financial Planning and other sources. Visit here

We invite you to browse our online course catalog and the variety of experiences delivered live and on-demand that cover a wide range of essential industry focused topics. Most provide CE credit that meet the CFP Boards yearly requirement. Visit here

Financial Planners Rally to Help Underserved Populations Impacted by the Coronavirus

FPA is recruiting members to provide free, no-strings-attached financial guidance to underserved Americans impacted by COVID-19 (the coronavirus). Underserved populations that need free, no-strings-attached financial guidance can see a list of CERTIFIED FINANCIAL PLANNER™ professional members of FPA who are making themselves available to help. Eligible FPA members interested in volunteering to assist can contact FPA Pro Bono Director, Kurt Kaczor.



COMMITTEE FEATURE: PUBLIC AWARENESS

by Jamie Bosse, CFP®, RFC

What is the Public Awareness Committee?

The purpose of the Public Awareness Committee is to foster a positive image of the financial planning profession, our chapter, and our members through the media. Our mission is to be a trusted resource for financial planning information in the Greater Kansas City area.

What are you Working On?

KCUR Smart Money Experts

The Public Awareness team makes regular appearances on the KCUR Up-To-Date program as the Smart Money Experts. We develop and provide a content outline on various financial planning topics to fill each 20-minute segment. Here are some examples of shows we have done:

- Planning for a New Arrival – Key Financial Considerations When Your Family is Growing
- Managing Your Career – Key Steps to Consider in Today's Economy
- Planning for Non-Traditional Couples
- How to Avoid Running Out of Money in Retirement
- Breaking up with Bad Financial Habits

Kansas City Star Money Matters **Column**

Twice a month, the PA committee provides the *Kansas City Star* with articles by our members for their *Money Matters* Column. This gives our members visibility in the press as well as providing some great education for the local readers.

Media Training

The Public Awareness committee works with FPA National to facilitate Media Training for our members every other year. This gives the membership insight and training on how to respond when reporters call. Once the training is complete, the members are added to a distribution list with access to interview opportunities from local and national media outlets multiple times a week!

MoneyWiseKC – Facebook and Twitter

This is our newest adventure! We realized we have a TON of great content that is mostly being shared on social media to other members. We want the great material our members produce to be seen and be available to anyone in the general public who can benefit from it. For now, we post all pro-bono activities, published articles, radio show and TV appearances of our members. Eventually, we would love to have an interactive medium to offer pro-bono advice and communicate with the general public.

Feel free to reach out anytime if you have questions about what we are doing or how you can help!

Jamie Bosse, CFP®, RFC
Financial Planner at Aspyre Wealth Partners
Financial Planning Association of Greater Kansas City Board Member
jbosse@aspyrewealth.com

MEET THE PUBLIC AWARENESS COMMITTEE

Jamie Bosse, CFP®, RFC, Chair
Aspyre Wealth Partners

Kristen Buchman, CFP®
The Trust Company

Nolan Keim, CFP®
Mariner Wealth Advisors

Lucas Bucl, CFP®
Aspyre Wealth Partners

Barbara McMahon, CFP®
Innovest Financial Partners

David Jackson, CFP®
Modern Horizons Wealth Advisors

Sandi Weaver, CFP®
Weaver Financial Planning

TAKE 5

MARCH 2020

New Member-Exclusive Newsletter from FPA and CNBC

FPA and CNBC have joined forces to launch ***Money Matters***, an exclusive newsletter that delivers the latest news from CNBC right to your inbox. Curated by CNBC journalists covering the world of investing and personal finance, Money Matters helps FPA members stay on top of important news and trends to better serve clients. Opt in to Money Matters now!

Group Health Plan – Exclusively for FPA Members

The FPA Group Health Plan, created and delivered in partnership with Ryan Insurance Strategy Consultants (RISC), is available exclusively to FPA members and designed to meet your firm's health plan needs while minimizing costs. Plans are available in most states for groups of 2-50, with rates approximately 25% lower than comparable ACA plans. Start saving now!

The Advisory Roadmap to 2030: Growth Through Innovation and Specialization

A majority of financial professionals don't have a business plan in place, according to key findings from the Advisory Firms in 2030: The Innovation Imperative report revealed by FPA and SEI at the 2019 FPA Annual Conference. To help financial planners anticipate and plan for client's changing needs over the next 10 years and beyond, FPA and SEI unveiled their latest research paper and second in the Innovation Imperative series, "Advisory Firms in 2030: Growth by Specialization" whitepaper. View the whitepaper now to learn how to meet the evolving needs of your clients and achieve success in the years ahead.

Patty Kreamer joins the FPA Coaches Corner as the Productivity Coach

Patty Kreamer, CPO® of Productivity Uncorked, LLC joined the FPA Coaches Corner in March to help financial planners take control of their time, brain clutter, inbox, interruptions, distractions and anything getting in the way of productivity. A Certified Professional Organizer® and Productivity Coach, Patty has personally improved the productivity and organization of thousands of lives. FPA members get free exclusive content and discounts on additional services from Kreamer. Access now.

Viva Las Vegas: FPA NexGen Gathering 2020 is Heading to the City of Entertainment

If you're searching for a reason to join the best and brightest minds of the next generation of financial planners, look no further. FPA NexGen Gathering is going to Las Vegas this June! It's the perfect time (and place) to connect with peers, discover new ideas, activate your curiosity and ignite your love for the profession…all while rolling the dice in the other city that doesn't sleep. An event dedicated solely to next generation planners, planners will have opportunities to discuss hot topics and trends facing the future of the profession and get a chance to learn from top minds in the profession June 21-24, 2020 at Sahara Las Vegas. Register now.

** Scholarship applications will be accepted through Mar. 20, 2020.*

Get a Moooove on Your Texas Retreat Plans

If you've been searching for those who share your commitment to changing people's lives through the power of financial planning, then you have to attend FPA Retreat 2020. FPA Retreat is the place where advanced financial planning practitioners put their passion for planning to work in pursuing mastery, refining leadership skills and working together to shape the future of the profession. Join us May 4-7, 2020 at the idyllic Hyatt Regency Lost Pines Resort in Cedar Creek, Texas for insights on the topics that matter, discussions that get to the heart of financial planning and, let's be honest, one too many smoked ribs. Register today.

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.

"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

OLIO

† 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

RYAN INSURANCE STRATEGY CONSULTANTS
Protecting Your Financial Plans Since 1978

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REVERSE MORTGAGE PLANNER

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Ash Brokerage

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Cavanal Hill

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Mariner Capital Advisors

BRONZE PARTNERS

BlueRock Capital Markets

Janus Henderson

CALENDAR OF EVENTS

April 23, 2020
4:30-6:00 p.m.
Women of FPAGKC Gathering
Nathan Astle, Financial Therapy Association
This event will be held virtually

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
Sponsored by:
Greater Kansas City Community Foundation

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
Sponsored by:
Fairway Independence Mortgage Corporation

November 5, 2020
5:00-7:00 p.m.
NexGen Happy Hour

November 18, 2020
2:30-5:15 p.m.
Chapter Meeting
Nonverbal Communication
Cyber Crime & Identity Theft
Jeff Lanza, Retired FBI Agent
Embassy Suites, Olathe
Sponsored by:
TD Ameritrade Institutional

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