

The Newsletter of FPA of Greater Kansas City

News & Views

April 2020



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FPA of Greater Kansas City

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www.fpakc.org

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 for \$100 Off

Discounts for CFP® Professional and Allied Professional memberships only.

FPA OF GREATER KANSAS CITY
FINANCIAL PLANNING ASSOCIATION

MESSAGE FROM THE CHAPTER EXECUTIVE

Brandy Johnson, CAE

I hope this newsletter finds you and your family healthy and safe. During these challenging times, I want you to know that myself, your leadership, and FPA national are here to support you.

FPA offers a monthly payment plan and membership extensions for current FPA members experiencing economic hardship. If you are having trouble affording your membership dues, and would like to switch to monthly payments or request a hardship extension, please contact the FPA Member Engagement Team at MemberServices@OneFPA.org or via phone at (800) 322-4237.

We have created a [COVID-19 resource page](#) on the chapter website, which includes helpful articles, webinars, and other resources from our chapter partners and other sources.

A LinkedIn group for members has been established as a value-add resource to support you and foster collaboration during these unusual circumstances. You can join this group at:

<https://www.linkedin.com/groups/12398567/>.

We look forward to the day we can meet in person again! The March meeting has been rescheduled for September 16th with the same agenda. Our May Ethics meeting will now be held virtually, see page six for additional information.

Stay well and please contact me if you have any questions or concerns.

Best regards,
Brandy Johnson, CAE
FPAGKC Chapter Executive
BJohnson@OneFPA.org



MEMBER MILESTONES

Ryan George, CFP®, CLU-10 years

Jennifer Griffis, CFP®-5 years

Click on the image below to see a special message from your FPA Staff!



2020 BOARD OF DIRECTORS

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Michael Wren, CFP®
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**Director of NexGen**

Jason Newcomer, CFP®
Barber Financial Group

**Chapter Executive**

Brandy Johnson, CAE
FPA of Greater Kansas City

**Director of Partnerships**

Jeffrey Hrabec
Cavanal Hill Distributors Inc.

COMMITTEE FEATURE: NEXGEN

by Jason Newcomer, CFP®

The FPA NexGen community is your connection to more than 2,500 like-minded new professionals who are ready to share their experiences and further the future of the financial planning profession. NexGen members are individuals who are in their first eight years in their financial planning career or studying to become a financial planner.

NexGen strives to provide members with a network that serves to educate, promote, and integrate the next generation of CFP® professionals. NexGen enacts this directive through the following service lines:

- **Community:** Foster inclusive communities dedicated to the development of the next generation of CFP® professionals.
- **Education:** Provide high-quality content about the practice, business, and profession of financial planning.
- **Career success:** Promote the growth and quality of the next generation of CFP® professionals' careers.
- **Advocacy:** Promote FPA and CFP® professionals as the credible voice in financial planning.

We believe these service lines support the next generation of CFP® professionals and will help elevate our profession.

Want to get involved with the NexGen community here in Kansas City? We're always looking for new members, whether you're studying to become a financial planner, have been in a planning role for a few years, or are interested in a career in financial planning. We host monthly events, which you can find at:

<https://fpakc.org/EventCalendar>

If you have any questions about NexGen, or know of someone who may enjoy getting involved, please e-mail me!



Jason Newcomer, CFP®

FPAGKC Director of NexGen

Barber Financial Group

jasonn@barberfinancialgroup.com

CAREER LISTINGS

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

ETHICS CHAPTER MEETING

ETHICS 2020

May 20, 2020

3:00-5:00 p.m.

This meeting will be held virtually. A link will be sent to registrants 24 hours in advance. Attendees will also be asked to complete an affidavit following the meeting for confirmation of attendance and paid registration.



L. Ann Coulson, Ph.D., CFP®

Kansas State University

Registration:

Member \$15

Non Member \$39

Continuing Education:

CFP® - 2 hours approved

Kansas Insurance - 2 hours approved

Dr. Coulson received her B.S. from the University of Missouri-Columbia in 1974. She spent the next eight years working for utility companies in Arkansas and Missouri providing public relations and education. She completed her M.S. in Operations Management from the University of Arkansas in 1980 and her Ph.D. in Human Environmental Sciences (Family & Consumer Economics) from the University of Missouri-Columbia in 1988. She completed the requirements for the CFP® certification in 1991.

From 1987 until 1996, Dr. Coulson taught at Kansas State University where she spearheaded the CFP® registered undergraduate program at Kansas State University. While at K-State she won the Conoco Undergraduate Teaching Award. She moved to Chicago in 1995. While in Chicago, Dr. Coulson served as the Director of the Institute for Personal Finance, an educational institution under the auspices of the Association for Financial Counseling and Planning Education (AFCPE). The purpose of the institute was to educate financial and housing counselors.

In 2001, Dr. Coulson and her family returned to Kansas where she opened a financial planning firm and began teaching online graduate level classes in financial planning for K-State. She has mentored more than 30 cohorts of students through K-State's CFP Board registered graduate certificate program. She returned full-time to the Manhattan campus in 2010 where she taught undergraduate and graduate students and also served as the academic advisor. In 2017, she moved to Ste. Genevieve, MO where she continues to teach online graduate level courses in financial planning for K-State.

Register Today: <https://fpakc.org/event-3668675>



FPA Offers Online Guide to Help Navigate COVID-19 Turmoil

As you cope with the recent turmoil in the markets stemming from the spread of COVID-19 (the coronavirus), FPA is supporting members by offering an online Volatility Resource Center to help financial planners navigate the markets and better serve their clients. [Access now.](#)

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](#).

FPA and CNBC Join Forces to Launch Co-Branded ‘Money Matters’ Newsletter for FPA Members

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!](#)

Call for Applications: 2021 FPA Board of Directors

Are you passionate about elevating the profession that transforms lives through the power of financial planning? If you are ready to take on a leadership role, FPA invites you to consider submitting an application for service on the 2021 FPA Board of Directors. Join a group of dedicated, dynamic FPA leaders who recognize the importance of today's actions on the future of the profession by contacting FPABoard@OneFPA.org to receive a board application package. [Learn more](#) about FPA Board service and how you can apply.

The Latest Issue of the “FPA Next Generation Planner” is Now Available

In partnership with FP Transitions, FPA issued its March issue of *Next Generation Planner*, an incredibly practical and ridiculously valuable monthly publication designed exclusively for those who are new to the financial planning profession. This edition features tips to manage work and family, addressing the unique challenges of HENRYs, overcoming common client problems, and more. FPA members interested in receiving the monthly issues of the *Next Generation Planner* can [download the app](#) on their Apple, Android or Windows devices.

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

The FPA Annual Conference 2019 recorded sessions featuring top industry speakers and up to 12 CFP® CE credits are now available. FPA members receive 30% off on all FPA Annual Conference 2019 recorded sessions. [Access now.](#)

Brought to you by...



RYAN INSURANCE
STRATEGY CONSULTANTS
"Protecting Your Financial Plans Since 1978"
An FPA Strategic Partner

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.



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



† 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



American Century
Investments®

LearningQuest®
529 Education Savings Program

creative^{one}
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GREATER KANSAS CITY
COMMUNITY FOUNDATIONSM



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CHAPTER PARTNERS

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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

May 7, 2020

5:00-7:00 p.m.

NexGen Happy Hour

May 20, 2020

2:30-5:15 p.m.

Ethics Chapter Meeting

Ann Coulson

This meeting will be held virtually

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 16, 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

Sponsored by: CreativeOne

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>