The Newsletter of FPA of Greater Kansas City

News&Views

June 2020

FINANCIAL PLANNING ASSOCIATION

FPA

GREATER KANSAS CITY

IN THIS ISSUE:

FPA of Greater Kansas City

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MESSAGE FROM THE CHAPTER EXECUTIVE

by Brandy Johnson, CAE

Happy Summer! We have made it through half of 2020, and what a year it has been so far. We have all experienced challenges and have had to adapt to the changing times. There has been a lot happening across the nation and within our FPA community.

If you have not already read the message that FPA leadership recently released on the need for an inclusive community, I encourage you to do so here.

FPA launched a new learning management system this week! Through the learning center you can access the FPA Journal CE quizzes, which are a quick and free way to complement our chapter activities and meet your CFP CE requirements. Visit the new Learning Center from the 'Learn' tab at financialplanningassociation.org or you can access it directly at fpalearning.onefpa.org.

Our chapter successfully held our annual Ethics meeting virtually in May with Ann Coulson, Ph.D., CFP® and in June we welcomed Cozy Wittman with the webinar Family Strategies for Paying for College and the Strategic Use of Student Loans. Our Women of FPA and NexGen groups have been holding virtual events as well.

On August 4 the Beta Test Chapters of FPA will be holding a webinar free of charge to members, stay tuned for additional information. August 26 Greg Valliere will be joining us virtually for U.S. Economic Outlook (see more on page 6). Your Board will continue to monitor regulations regarding in-person meetings and hope that we'll be able to see you all in person soon.

FPA officially kicked-off its first FPA Virtual Externship with 1,950 aspiring CFP™ professionals on June 1, 2020. An alternative to replace canceled summer internships, this eight-week immersive program offers in-depth training to help students—and those interested in making financial planning their vocation—apply classroom theory to real-life scenarios.

With 2020 half over it is time for us to begin planning for next year. If you have any interest in serving on the FPA of Greater Kansas City Board or any of our Committees, please contact me to discuss, I am happy to answer any questions you have.

Sending you all wishes for health and safety.

Brandy Johnson, CAE
FPAGKC Chapter Executive
BJohnson@onefpa.org

CAREER LISTINGS

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

2020 BOARD OF DIRECTORS

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Chapter Executive
Brandy Johnson, CAE
FPA of Greater Kansas City

COMMITTEE FEATURE: PROGRAMS

by Ben Skilling, CFP®

It is important that we start with thanking all of you, our loyal members and generous sponsors. Because of your affiliation with the FPA of Greater Kansas City, we are afforded the opportunity to partner with industry renowned speakers to headline many of our chapter meetings. Recently this has included the likes of Michael Kitces, Josh Brown and Mitch Anthony. Later this summer, we look forward to having Greg Valliere, Chief U.S. Policy Strategist, join our August Chapter meeting to provide what will be a very timely political update. You will not want to miss it!

The purpose of the Programs Committee is to develop and plan programming for FPA chapter meetings. Specifically, the committee is charged with obtaining speakers with timely and relevant topics that will address membership's need for valuable, educational content. In many cases, these meetings provide continuing education credit. As a committee, we are in continuous pursuit of providing valuable programming to our members.

If you have suggestions around topics, speakers or other event ideas, we would love to hear them. Please don't hesitate to reach out to share your ideas.

Ben Skilling, CFP®
FPAGKC Director of Programs
Waddell & Reed
bskilling@waddell.com

WELCOME NEW MEMBERS

Tanner Benjamin Garrett
Dennis Lawlor
John Ludlow, CFP®
Kate Anastasia McCann
Mitch Anson McMonigle
Samantha Varacalli

MEMBER MILESTONES

Matthew Starkey, CFP® - 20 years
Barney Barnes, III, CFP®-10 years
Amy Cole, CFP®-5 years
Tim Vannoy, CLU, ChFC, CFP®-5 years

AUGUST CHAPTER MEETING

U.S. Economic Outlook

August 26, 2020

3:00-5:00 p.m.

Greg Valliere

Greg Valliere has followed Washington for investors for the past 40 years. Greg specializes in coverage of economic issues, taxes, the Federal Reserve and -- of course -- politics. He has held numerous positions, including Director of Research at the Charles Schwab Washington Research Group. Greg currently is the Chief U.S. Policy Strategist at AGF Investments (AGF), a global asset management firm with headquarters in Toronto, Canada.

Greg is a frequent guest on CNN, Fox Business TV, Bloomberg radio and TV, and CBS Radio News. He is frequently quoted in the *Wall Street Journal*, *Barrons*, and the *Washington Post*.

A graduate of George Washington University, Greg and his wife Mary live in the Watergate in downtown Washington.

This meeting sponsored by:

GREATER KANSAS CITY COMMUNITY FOUNDATION℠

Registration:
Members $29
Non Member $99

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

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.

Register Today: https://fpakc.org/event-3668680

STUDENTS FROM KSU AND MU COMPETE AT AFCPE FINANCIAL COUNSELING KNOWLEDGE BOWL

Congratulations to the students from the Kansas State University and University of Missouri Departments of Personal Financial Planning for being selected as six elite financial planning programs to participate in the 2020 Association for Financial Counseling and Planning Education (AFCPE) Financial Counseling Knowledge Bowl!

Knowledge Bowl teams, comprised of three currently enrolled undergrad students compete against each other in a game show-style competition during the symposium. Questions are focused on the AFC® Core Competencies.

Take 5

June 2020

FPA Launches Enhanced Digital Experience and New Brand Promise

On May 20, FPA launched a revamped website (FinancialPlanningAssociation.org) and unveiled new branding. The upgrades to the digital experience for members come at a time when financial planning is more critical than ever, and when practitioners need the support of their peers and community to provide the best possible service to their clients and all who need their services. The new FPA website will provide members with easier and more flexible access to the benefits of FPA membership—growth, inspiration, amplification and belonging—and supply members with the tools, resources, insights and guidance they need to become the best financial planners they can be. The upgraded user experience also delivers on the association's newly enhanced brand, including FPA's new brand promise, *Change Tomorrows™*. Learn more.

Are You in Compliance with the New CFP® Standards?

As of June 30, all CFP® professionals will be required to adhere to the new CFP Board *Code of Ethics and Standards of Conduct*. To help members meet the terms of these new standards, the FPA Member Advocacy Council (MAC), in partnership with Rochelle Truzzi from Hardin Compliance Consulting, created the **FPA Compliance Toolkit for the New CFP® Standards** that includes model engagement letters, checklists and more. To ensure you're as prepared as possible, check out the new toolkit now.

New Research: Financial Advisers Feeling Bearish for the Next Six Months

FPA, the *Journal of Financial Planning* and Janus Henderson Investors released the 2020 Trends In Investing Survey that shows where financial advisers are investing today and where they plan to invest in the coming year. The survey also reveals how financial planners are feeling about the pandemic and their outlook for the economy, insights from your peers on investment trends, and more. Download the 2020 Trends in Investing Survey report now.

FPA

Take 5

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're 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. Applications are due July 1, 2020. Learn more about FPA Board service and how you can apply.

FPA Offers Online Resource Center to Help Navigate Market Fluctuations

As you cope with the fluctuations in the markets stemming from the spread of Covid-19, FPA is supporting financial planners by offering an online Volatility Resource Center to help financial planners navigate the markets and better serve their clients. The majority of the resources are available to all financial planners, regardless of FPA membership status. Access now.

FPA and *CNBC* launch co-branded *'Money Matters'* newsletter—now available!

Want the latest investments and personal finance headlines delivered to your inbox twice each month? FPA and *CNBC* are collaborating to publish the co-branded *Money Matters* newsletter exclusively for FPA members. Delivered twice each month, the newsletter delivers the latest headlines from *CNBC* that you need to read. Opt-in for Money Matters now.

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Cavanal Hill
First Trust Advisors, L.P.
Mariner Capital Advisors

BRONZE PARTNERS

BlueRock Capital Markets
Janus Henderson

CALENDAR OF EVENTS

August 6, 2020
5:00-7:00 p.m.
NexGen Happy Hour

August 26, 2020
11:30 a.m.-2:00 p.m.
Virtual Chapter Meeting
Greg Valliere
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

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

December 17, 2020
7:30-8:45 a.m.
Women of FPAGKC Gathering
First Watch, 9916 College Blvd, Overland Park

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