

The Newsletter of FPA of Greater Kansas City

News & Views

July 2020

FPA

FINANCIAL
PLANNING
ASSOCIATION

GREATER
KANSAS CITY

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FPA of Greater Kansas City

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www.fpakc.org

BECOME YOUR BEST YOU

If you're looking for a place to belong, FPA is here for you. Our community is made up of planners like you who are committed to excellence and are working together to drive the profession forward.

Save \$100 on your first-year of membership when you join now!

Use Code GKC100 at JoinFPA.org for \$100 Off

Discounts for CFP® Professional and Allied Professional memberships only.

MESSAGE FROM THE CHAPTER PRESIDENT

by Mark Albright, CFP®, CRPC®

Hi All,

Hope you and your families are well as 2020 continues to roll along. We have a busy schedule here with the FPA of Greater KC to close out the year with chapter meetings in August, September, October and November. That's not to mention our virtual women's and NexGen events.

We have been closely watching the developments with the Covid-19 virus and its implications on our ability to meet in person. The board has been doing our best to balance the desire to get together personally while doing our part to help keep everyone safe. We appreciate your patience and flexibility as we navigate this evolving situation.

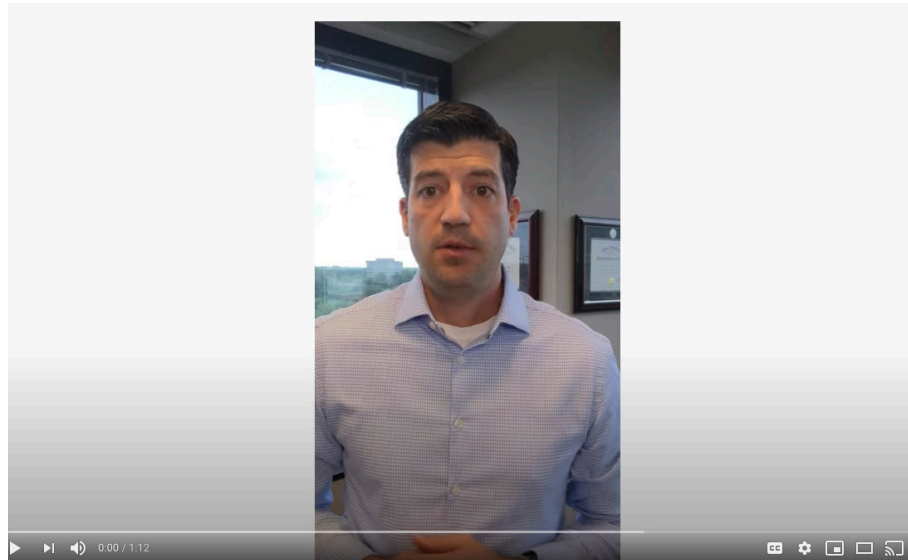
Regardless of the format we want to help foster an environment of collaboration and support as we always have. We look forward to connecting with you all in whatever capacity we are able and look forward to making the best of this challenging environment.

Our best to you all for a safe and productive 2nd half of the year.

Mark Albright, CFP®, CRPC®
FPAGKC Chapter President
Caliber Wealth Management
Mark.Albright@caliberkc.com



VIDEO MESSAGE FROM THE CHAPTER PRESIDENT



CAREER LISTINGS

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

2020 BOARD OF DIRECTORS



Chair of the Board
George A. Fernandez, CFP®
Mariner Wealth Advisors



Director of Programs
Ben Skilling, CFP®
Waddell & Reed



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



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



President Elect
Tyler Landes, CFP®, AIF®
Tandem Financial Guidance, LLC

Directors of Student Mentoring
and Career Development



Frances Lawrence
University of Missouri



Secretary/Treasurer
Todd C. Ericson, CFP®
Stepp & Rothwell, Inc.



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



Director of Community Outreach
Allison Becker
Legacy Financial Strategies, LLC

Directors at Large



Jack Giardino
Mariner Wealth Advisors



Director of Government Relations
Cole K. Foster



Bob Harris
Creative Planning



Director of Membership
Carrie Ohm, CPFA
Resources



Michael Wren, CFP®
Legacy Financial Strategies, LLC



Director of NexGen
Jason Newcomer, CFP®
Barber Financial Group



Chapter Executive
Brandy Johnson, CAE
FPA of Greater Kansas City



Director of Partnerships
Jeffrey Hrabe
Cavanal Hill Distributors Inc.

CHAPTER MEMBERS RECOGNIZED AS 2020 40 UNDER 40

Congratulations to Chapter Members Jamie Bosse and Martin Seay for being named *InvestmentNews* Top 40 Under 40.

The 40 individuals profiled exemplify the talent of the young advisers and associated professionals who are building and expanding the financial advice industry. In addition to their personal accomplishments, members of the *InvestmentNews* 2020 class of 40 Under 40 have exhibited exceptional leadership within the profession. They were chosen by a team of reporters and editors who selected these 40 out of nearly 1,000 online nominations.

The full list of awardees is available at <https://40under40inadvice.com/>.

Congratulations Martin and Jamie!



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



Martin Seay, Ph.D., CFP®
Kansas State University
FPA President

WELCOME NEW MEMBERS

Lillianna Concannon
Bradley Malmquist
Izaac Leroy Pritchett, Student
Matthew M. Schlossman

MEMBER MILESTONES

Dennis Henks, CFP® - 10 years
Emily Petty, CFP®-10 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 FOUNDATIONSM

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>

A WORD FROM OUR PLATINUM PARTNER



GREATER KANSAS CITY COMMUNITY FOUNDATIONSM



Chris Rigsby
Philanthropic Wealth Advisor



Corey Ziegler
Vice President & Corporate Counsel

See pages 8-9

Member Roundtable: Complex Charitable Assets and Business Valuations

Virtual Event Via Zoom
Friday, September 25, 2020
11:30 a.m. to 12:30 p.m.

Presented by:



Experts from the Greater Kansas City Community Foundation and Mariner Capital Advisors invite you to join a virtual discussion on gifting complex charitable assets and business valuations for tax planning. Learn how your clients can donate non-cash assets like real estate and privately held business interests to a charitable fund and the fundamentals of business valuation for gift and estate tax planning. You will hear from:

- Corey Ziegler, Vice President & Corporate Counsel at the Greater Kansas City Community Foundation
- John Stevenson, Valuation Director at Mariner Capital Advisors

This is a members only event. Zoom information will be emailed the morning of the meeting.

RSVP today at: <https://fpakc.org/event-3924850>.



Help Your Clients Grow Their Charitable Legacy

A donor-advised fund at the Greater Kansas City Community Foundation is the fastest and easiest way to create a charitable legacy, benefit from tax advantages of giving, and make the world a better place.

**Learn more about donor-advised funds at
www.GrowYourGiving.org or 816.842.0944**



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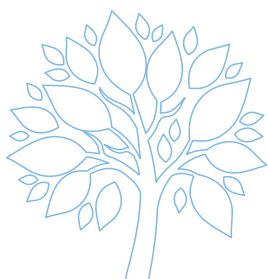
Retirement Account Giving Strategies

Your clients can use their retirement accounts for tax-efficient charitable giving. Whether they have a tax-deferred IRA or a 401(k), here are a few strategies to consider:

- Help your clients establish a donor-advised fund at the Greater Kansas City Community Foundation as the beneficiary of their retirement account at death. Their retirement account can pass to their donor-advised fund tax-free because the fund is administered by the Community Foundation, a public charity. This leaves more assets in their charitable fund to support their favorite nonprofit organizations.
- Your clients can name a charitable remainder trust as the beneficiary of their retirement account to stretch the distribution over time. The SECURE Act, passed into law in December of 2019, requires most non-spouse retirement account beneficiaries to withdraw all assets of an inherited account within 10 years. This means their beneficiary can no longer stretch the payouts from their retirement account across their life expectancy. However, if their retirement account is payable to a charitable remainder trust, the trust payments can be made to one or more individual beneficiaries over their lifetimes or for a term of years (up to 20 years), with the remainder interest passing to charity. This defers the income taxes the beneficiaries would have paid if they received the retirement account directly. A donor-advised fund at the Community Foundation may be named as the remainder beneficiary of a charitable remainder trust. The Community Foundation can also serve as the trustee of the trust.
- Pair a Roth conversion with a donation to a donor-advised fund. Your clients can convert a traditional IRA to a Roth IRA without penalty, if the money is moved from the traditional IRA to the Roth IRA within 60 days. However, that transfer is a taxable event. If your clients donate cash or other assets to their donor-advised fund in the same year, they may be able to reduce their tax liability.
- If you have clients that are at least age 70 ½, they can make a qualified charitable distribution (QCD) from their IRA during their lifetime. They can distribute up to \$100,000 annually from their IRA directly to their favorite charities without recognizing income on those distributions. If they want to stagger their donation to a single charity over multiple years, rather than making the donation in one lump sum, the Community Foundation can help them create a designated fund for that charity. They can also use a QCD to establish and contribute to a scholarship fund.

Community Foundation staff is available to help you better serve your charitable clients.

Contact Philanthropic Wealth Advisor Chris Rigsby with any questions at rigsby@growyourgiving.org or 816.627.3416.



Chris Rigsby,
Philanthropic Wealth Advisor at the Greater
Kansas City Community Foundation





Take 5

July 2020

FPA Launches New Learning Center

To provide cutting-edge and easily-accessible programming to those in the financial planning community, FPA launched a new Learning Center in partnership with CommPartners on June 20. The new Learning Center features a simplified single sign-on (SSO) for users, 150+ on-demand webinars (with more than half offering continuing education credit), and easy access to *Journal of Financial Planning* and *Financial Services Review* exams. Registrants can also identify courses of interest, including the level of complexity, specific financial planning modules, and more. Live, online courses have resumed and FPA members will soon be able to access a comprehensive learning transcript that captures all their FPA learning experiences, including completed courses and conference sessions. [View and register for courses](#) today as you continue to pursue mastery in financial planning.

What are Your Peers Learning This Month?

Dive deeper into this month's *Journal of Financial Planning* to discover strategies and resources for addressing systemic racism in the profession by creating inclusivity, preparing for prospective clients' questions, and making a difference. Additionally, Robert B. Mauterstock Jr., CFP®, CLU®, ChFC, CLTC will address the concerns of aging Baby Boomers and offer suggestions for financial planners to change from being asset managers to lifestyle managers. Thank you to American Advisors Group for powering this month's *Journal of Financial Planning*. [Check out the July issue.](#)

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.](#)

Support the Advancement of the Financial Planning Profession

The FPA Political Action Committee (PAC) is the only registered PAC to support federal candidates representing the interests of the financial planning profession. The PAC allows us to support candidates for Congress who will make supporting the financial planning profession and financial planners a priority. To help us fight for our profession, we ask you to [make a contribution](#) to support your FPA PAC. Whether you contribute \$50 or \$5,000, every dollar is appreciated and will support our efforts in elevating the profession.

New to the Profession? Check Out the FPA Next Generation Planner

In this month's *FPA Next Generation Planner*, learn from Cameo Roberson, AAMS®, about how you can use volunteering to build your professional brand. Also, get tips from your peers on how best to communicate your value to clients and potential clients and why past financial crises made Karma Forrestal, CFP®, a better financial planner. Thank you to TD Ameritrade Institutional and Ryan Insurance Strategy Consultants for powering the *FPA Next Generation Planner*. [View the July issue.](#)

The YAFPNW Giving Back Panel

In a recent episode of the "You're a Financial Planner...Now What?" podcast, Hannah Moore, CFP® hosts a "giving back" panel with FPA Pro Bono Director Kurt Kaczor; Robinson Crawford, CFP®; FPA of Georgia NexGen Director Alex Wilson, CFP®; and Kyle Eaton, CFP®. Thank you to Finance of America Reverse for powering this podcast episode. [Tune into this episode](#) to learn more about how these individuals got involved in pro bono work, what it has taught them and how those looking to give back can get started.

Take 5 is Brought to You by Ryan Insurance Strategy Consultants

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.



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

BRONZE PARTNERS

BlueRock Capital Markets
Janus Henderson

The FPA logo consists of the letters 'FPA' in a white, bold, sans-serif font. A horizontal orange and red swoosh underline is positioned beneath the 'A'.

FINANCIAL PLANNING ASSOCIATION

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A close-up photograph of a notepad with a grid pattern. Handwritten in black ink are the words 'Roth IRA' and 'Traditional IRA' separated by a vertical line. A plus sign is written below 'Roth IRA'. In the background, a white calculator and US dollar bills are visible.

Actionable Roth Business Building Strategies: A Vehicle for Tax Efficient Planning and Income

Brian Dobbis, QKA, QPA, QPFC, TGPC
Lord Abbett

Join Brian Dobbis as he discusses
the following key topics:

- What's new
- 2020 Legislative Outlook
- Roth Conversions (pros, cons, and traps)
- Back Door Roth
- Supersize your Roth
- Mega Back Door Roth
- Advisor Action Plan
- Your questions!




FREE WEBINAR

August 4, 2020

11:00AM CST

REGISTER NOW



This webinar is the collaboration of the

- FPA of Charlotte
- FPA of Colorado
- FPA of Illinois
- FPA of Greater Kansas City
- FPA of Northern New England
- FPA of Metro New York
- FPA of New Jersey
- FPA of Orange County
- FPA of the Philadelphia Tri-State Area
- FPA of Middle Tennessee
- FPA of the Triangle

CALENDAR OF EVENTS

August 4, 2020

11:00 a.m.-12:30 p.m.

Free Webinar for Chapter Members

[Actionable Roth Business Strategies: A Vehicle for Tax Efficient Planning & Income](#)

August 6, 2020

5:00-7:00 p.m.

[NexGen Happy Hour](#)

August 26, 2020

3:00-5:00 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

11:30 a.m.-12:30 p.m.

[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>