

The Newsletter of FPA of Greater Kansas City

News & Views

August 2020



FPA FINANCIAL
PLANNING
ASSOCIATION
GREATER
KANSAS CITY

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FPA of Greater Kansas City

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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 PROGRAMS CHAIR

by Ben Skilling, CFP®

The common quote “The only certainty is uncertainty” could not be more relevant in describing the current times. While we are all having to adjust and remain flexible to navigate through this challenging environment, we wanted to provide some updates to the scheduling for the remainder of the year and into 2021.

With the health and safety of our members at the forefront, the board voted to move all chapter meetings to virtual through March of 2021. While we will continue to monitor and assess the situation, this decision allows us the ability to move forward with planning and coordinating upcoming meetings and events to ensure we are delivering on our mission of providing our members with timely and relevant content.

With that said, we are excited to announce a new opportunity in 2021 for the Greater Kansas City FPA

Chapter! We are in the early planning stages of rolling out an inaugural FPA Day where our members and sponsors will have the opportunity to participate in a full day of networking, engage with industry experts across a variety of topics, participate in general and breakout sessions designed to help your business development and of course, gain a number of CE credits in the process. And yes, we are planning for this to be an in-person event! We will continue to share the details leading up to this event but we are excited for what is in store for 2021.

Ben Skilling, CFP®

FPAGKC Programs Chair
Waddell & Reed
bskilling@waddell.com



WELCOME NEW MEMBERS

Andrew W. Beil, CFP®

Mark Gruber

Shari L. Hoffman

Kaytlan Michelle Uhlman, CFP®

Paul Watkins, CFP®

MEMBER MILESTONES

Dennis Henks, CFP®-10 years

Emily Petty, CFP®-10 years

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



President

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



President Elect

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



Secretary/Treasurer

Todd C. Ericson, CFP®
Stepp & Rothwell, Inc.



Director of Community Outreach

Allison Becker
Legacy Financial Strategies, LLC



Director of Government Relations

Cole K. Foster



Director of Membership

Carrie Ohm, CPFA
Resources



Director of NexGen

Jason Newcomer, CFP®
Barber Financial Group



Director of Partnerships

Jeffrey Hrabe
Cavanal Hill Distributors Inc.



Director of Programs

Ben Skilling, CFP®
Waddell & Reed



Director of Public Awareness

Jamie A. Bosse, CFP®, RFC
Aspyre Wealth Partners



Directors of Student Mentoring and Career Development

Mary Dorn, MBA
University of Missouri



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



Directors at Large

Jack Giardino
Mariner Wealth Advisors



Bob Harris
Creative Planning



Michael Wren, CFP®
Legacy Financial Strategies, LLC



Chapter Executive

Brandy Johnson, CAE
FPA of Greater Kansas City

SEPTEMBER CHAPTER MEETING

September 16, 2020

11:45 a.m. - 2:00 p.m.

VIRTUAL



SPECIAL GUEST

MARTIN SEAY, PH.D., CFP®

2020 FPA President

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:

creativeone
diversified financial services

Registration:

Members \$15

Non Member \$29

Continuing Education:

CFP® - 2 hours approved

Kansas Insurance - 2 hours approved

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



COMPLEX CHARITABLE ASSETS & BUSINESS VALUATIONS

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

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

Please RSVP via the FPAKC website to confirm your attendance. Registered attendees will receive Zoom information on the morning of the event.

Questions? Contact Ashley Hawkins at hawkins@growyourgiving.org or 816.268.3283.



Take 5



August 2020

Register Today: 'State of FPA' Virtual Update Scheduled for September 9

What has FPA been doing over the past 12-months to serve our members and elevate the profession? What do the recently completed 2019 audited financial statements show about the financial health of the association? Join FPA leaders for a 'State of FPA' Virtual Update on September 9 at 4:00 p.m. ET to learn how your membership association is doing today and what is on the horizon. [Register to attend.](#)

Become an FPA NexGen Leader

Are you passionate about the financial planning profession? Are you a professional who has something special to contribute to the future of FPA NexGen? If so, we want your application! FPA NexGen is a dynamic, growing community of passionate financial planners looking to shape the future of the profession while supporting the career trajectories of its members. Led by an elected Organizational Director, President-Elect, President and Chair who work intimately with FPA to serve the next generation of financial planners, the community is now searching for its next [President-Elect](#), [Local Leader Coordinator](#), [Public Relations Coordinator](#) and [FPA NexGen Gathering Co-Coordinator](#) who will help lead NexGen in 2021. Applications are due Friday, Aug. 21. Final candidates will be announced in fall 2020.

Being a Pro Bono Financial Planner Just Got Easier

The Foundation for Financial Planning launched a tool to connect financial planners to nonprofits and FPA chapters with pro bono opportunities to help those in need. Create a planner profile to browse pro bono volunteer opportunities, or post an opportunity on behalf of your FPA chapter at probonoplannermatch.org.

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.

Do You Want to Get Media Queries in Your Inbox? Be a Part of FPA MediaSource!

Reporters from around the country are sending out media queries to CFP® professional members of FPA each day. They provide FPA members with a great opportunity to actively engage reporters on the stories they are working on while providing them with an opportunity to build name recognition and awareness. Want to take part? Simply attend the All-Member Virtual Media Training on Aug. 26 at 4 p.m. ET to take the first step to being part of the system. [Register today.](#)

FPA Job Board Has Solutions to Help You Grow

Whether you're searching for the best talent in the industry or you're seeking the next opportunity in your career, the FPA Job Board has you covered. Posting your resume is free and first-time job posters save 15% on 30 or 60 day listings with promo code FPAFIRST. [Get started today.](#)

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.



RYAN INSURANCE
STRATEGY CONSULTANTS
"Protecting Your Financial Plans Since 1978"

FPA

Annual Conference 2020

September 30–October 2



We're excited to announce that the FPA Annual Conference you know and love is going digital in 2020.

Join us September 30–October 2 for an immersive, three-day experience that will provide you what you need to pursue mastery in the business, practice and profession of financial planning—wherever you choose to log in. **#FPAConf20** is your chance to gather with the profession's leaders, innovators and change-makers to discover the latest in financial planning and learn their secrets for success.

Join us for insights on the topics that matter and discussions that get to the heart of the important work you do every day—register for **#FPAConf20** today.

fpaannual.org

CHAPTER PLATINUM PARTNERS



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Investments®

LearningQuest®
529 Education Savings Program

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diversified financial services



GREATER KANSAS CITY
COMMUNITY FOUNDATIONSM



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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

September 3, 2020

NexGen Roundtable Discussion (members only)

September 16, 2020

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

Virtual Chapter Meeting

Economic Update

William Greiner, CFA, Chief Economist, Mariner
Wealth Advisors

SECURE Act

Dennis Mattern and Andrew Payne, CreativeOne
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.

Virtual Chapter Meeting

Michael Finke

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.

Virtual Chapter Meeting

Nonverbal Communication

Cyber Crime & Identity Theft

Jeff Lanza, Retired FBI Agent

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>