

The Newsletter of FPA of Greater Kansas City

# News & Views

March 2021



**FPA**

**FINANCIAL  
PLANNING  
ASSOCIATION**

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**GREATER  
KANSAS CITY**

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## FPA of Greater Kansas City

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## CAREER LISTINGS

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



# THE STATE OF NEXGEN

by Landon Warmund, CSLP®

As everything around us dramatically changes, NexGen changes as well. With our past meetings traditionally being in person, we've made the complete switch to virtual. This of course comes with pros and cons. The biggest disadvantage is the smaller opportunity to truly network with other industry professionals as we have in the past through our in-person NexGen Happy Hours. With that being said, one massive opportunity that has presented itself is the elimination of location as a limitation for bringing in valuable speakers. We've been able to bring in speakers from across the country to provide content on how younger planners can continue to grow their digital presence, add value to their firm through this, and simply grow as an individual within the financial planning profession! While I'm excited for us to make the eventual switch back to in-person events, I'm even more excited for the upcoming speakers and the value they will bring to our NexGen chapter.

## THE PUSH FOR DIGITAL

With young and aspiring planners entering the industry, the massive digital switch that's happening gives these individuals a tremendous opportunity that was never as present as it is now. What is that you ask? Here's a few!

## NO LOCATION LIMITATION

More and more individuals entering the profession now have the opportunity to live where they want and work for who they want virtually. There's also more virtual internships available that give college students the higher likelihood of obtaining a high-quality internship with the kind of firm they want.

## SHOW OFF YOUR TECH SAVVY SKILLS

There's more firms out there that are wanting a digital presence and more technology in their practice. A young aspiring planner with the ability to show off a little bit has a tremendous opportunity to add a massive amount of value through better navigating planning software, integrations, and improving overall efficiency of a firm. With the average age of the financial advisor being over 50, this is the opportunity to assist in bridging the tech gap that some not as tech savvy advisors might be struggling with.

## OPPORTUNITY TO STAND OUT

A strong professional social media presence will take you a long way. We have more reach than ever with recent the digital push. For those entering the profession, this is your chance to utilize your profiles to network and potentially provide you with opportunities that were originally unavailable.

For additional information or to get involved with NexGen email Landon at [lsw@reliantfin.com](mailto:lsw@reliantfin.com).



**Landon Warmund, CSLP®**  
FPAGKC 2021 NexGen Chair

# 2021 BOARD OF DIRECTORS



## **Chair of the Board**

Mark Albright, CFP®, CRPC®  
Caliber Wealth Management



## **President**

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



## **President Elect**

Carrie Ohm, CPFA  
Resources Investment Advisors



## **Secretary/Treasurer**

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Stepp & Rothwell, Inc.



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Mariner Wealth Advisors



## **Director of Community Outreach**

Allison Becker, CFP®  
Mana Financial Life Design



## **Director of Government Relations**

Cole K. Foster, CFP®



## **Director of Membership**

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Barber Financial Group



## **Director of NexGen**

Landon Warmund, CSLP®  
Reliant Financial Services



## **Director of Partnerships**

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

## **Directors at Large**



Jennifer Calvi, CFP®  
Creative Planning, Inc.



Michael Diederich, CFP®  
UMB



Angela Robinson, CFP®, ChFC, CRPC,  
CLF, CRPS, APMA, BFA  
Robinson Wealth Advisors



## **Chapter Executive**

Brandy Johnson, CAE  
FPA of Greater Kansas City

# MAY ETHICS CHAPTER MEETING

**ETHICS 2021**

**MAY 19, 2021**

**2:45-5:00 p.m.**



**L. Ann Coulson, Ph.D., CFP®**

*Kansas State University*

**Registration:**

Member \$15

Non Member \$29

**Continuing Education:**

CFP® - 2 hours approved

Kansas Insurance - 2 hours pending

**Register Today: <https://fpakc.org/event-4090742>**



**American  
Heart  
Association®**

**Charity Begins at Home: Family Philanthropic Conversations with Clients**

**May 11, 2021**

**1:00 p.m.**

American Heart Association's panel of experts will discuss why advisors should introduce family philanthropy to their clients, explore the design and implementation of philanthropic solutions and charitable tools to accomplish this goal as well as dynamic multigenerational meetings and conversations. Presentation will conclude by addressing common pitfalls when counseling families to make for a smooth probate process! Bring your questions for our Q&A!

**[Sign up today!](#)**



# Take 5

March 2021

## Master the Art of Client Trust and Communication

Being able to communicate effectively is one of the most important skills you can learn, but it's particularly crucial in the financial planning profession. Successful financial planners understand the importance of communication and how it can build client trust. To help you master the art of client communication and building trust, FPA is pleased to offer this round-up of information and resources that are available to FPA members. [Check them out today.](#)

## Where are You Investing? The *Journal of Financial Planning* Wants to Hear from You

For the past 15 years, the *Journal of Financial Planning* has conducted the annual Trends in Investing Survey to identify key trends that impact planners and their clients. [Take a few minutes and participate](#) in the 2021 Trends in Investing Survey. Results will be published in the June issue of the *Journal of Financial Planning*, and you'll have a chance to win a \$100 VISA gift card. [Take the survey today.](#)

## Support the Advancement of Your Profession

The FPA Political Action Committee (PAC), the only PAC that supports advancing the financial planning profession, is consistently sought out by state and federal agencies as resources and trusted voices of the fiduciary community in a continually changing landscape. Members of Congress are contacted from all sides of the industry and the relationships we forge on and off the Hill are crucial to doing the right thing on your behalf. 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 advocating on your behalf.

**Podcast: The Future of the Financial Planning Association**

In a recent *Gaining Perspective* podcast episode hosted by *Advisor Perspectives*, FPA President Skip Schweiss, CFP®, AIF®, and FPA CEO Patrick D. Mahoney discuss FPA's role in the profession and their vision for future of the Association. [Tune into this episode.](#)

**Advantage of Opportunities to Save on Products and Services**

FPA members can access special discounts and rates on various products and services that help with the practice of financial planning. [Learn more about these opportunities to save.](#)

**New to the profession? Check out the FPA Next Generation Planner**

In this month's *FPA Next Generation Planner*, learn about trends influencing the FinTech landscape, the changing role of financial planners, tips on how to improve yourself in your spare time, and more. [View the March issue.](#)

\*Thank you to Finance of America Reverse for powering this month's *FPA Next Generation Planner*

**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](http://www.ryan-insurance.net).



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

# CHAPTER PLATINUM PARTNERS



American Century  
Investments®

LearningQuest®  
529 Education Savings Program



GREATER KANSAS CITY  
COMMUNITY FOUNDATION<sup>SM</sup>



**FAIRWAY®**

INDEPENDENT MORTGAGE CORPORATION

NMLS#2289



THE  
TIFIN  
GROUP



# CHAPTER PARTNERS

## GOLD PARTNERS



## SILVER PARTNERS

Ash Brokerage

Capital Group/American Funds

CarePatrol

Cavanal Hill

UMB

## BRONZE PARTNERS

BlueRock Capital Markets

Waddell & Reed

# PARTNER SPONSORED EVENTS



**May 19, 2021**

9:00 a.m.-5:00 p.m.

## **The Rebuilding American Retirement Summit**

Join Fairway Mortgage for their first ever Financial Advisor Summit. Hear from 7 different speakers about how to further your business and help to improve how retirement is done in America!

[Additional information](#)



**May 6, 2021**

12:00-1:30 p.m.

## **Senior Living Transition Planning**

The purpose of this workshop is to discuss some best practices for your clients around the topics of estate planning, downsizing, long term care insurance and choosing a senior living community.

[Additional information](#)

## **WELCOME NEW MEMBERS**

Carlee Albert

Tonya Lore

Isaac Daniel Rodd, CFP®

## **MEMBER MILESTONES**

Michael Sharp - 5 years

Jennifer Calvi, CFP® - 15 years

Ryan C. Lovill, CFP® - 15 years

James G. Dussold, CFP® - 20 years

# CALENDAR OF EVENTS

**April 1, 2021**

12:00 p.m.

**NexGen Roundtable**

**April 22, 2021**

8:00 a.m.

**Women of FPA Event: Saying No to Stress**

**PARTNER EVENT**

**May 6, 2021**

12:00-1:30 p.m.

**Senior Living Transition Planning**

**May 11, 2021**

1:00-2:00 p.m.

**The American Heart Association Presents...  
Charity Begins at Home: Family Philanthropic  
Conversations with Clients**

**May 19, 2021**

2:45-5:00 p.m.

**May Virtual Chapter Meeting**

**ETHICS 2021**

**Ann Coulson, PhD, CFP®**

**PARTNER EVENT**

**May 19, 2021**

9:00 a.m.-5:00 p.m.

**The Rebuilding American Retirement Summit**

**June 16, 2021**

11:45 a.m.-1:15 p.m.

**Virtual Chapter Meeting**

**The Science of Influence: Six Simple Ways to  
Get Your Clients to Take Your Best Advice**

**Daniel Crosby, PhD**

**August 24, 2021**

8:00 a.m.-5:00 p.m.

**Chapter Symposium**

**Embassy Suites, Olathe**

**Details coming soon!**

**October 20, 2021**

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

**October Chapter Meeting**

**Embassy Suites, Olathe**

**Integrating Client Psychology into Your  
Practice**

**Martin Seay, Ph.D., CFP®**

**Crypto/ Bitcoin**

**Tyrone V. Ross Jr**

**November 17, 2021**

3:00-5:00 p.m.

**November Chapter Meeting and Social**

**Embassy Suites, Olathe**

**Advising Clients through the Toughest  
Times of Life**

**Amy Florian, CEO of Corgenius**

**For a full list of events and registration  
please visit our website at  
<https://fpake.org/EventCalendar>**