

The Newsletter of FPA of Greater Kansas City

News & Views

May 2021

**FINANCIAL
PLANNING
ASSOCIATION**

**GREATER
KANSAS CITY**

FPA

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FPA of Greater Kansas City

PO Box 4303
Topeka, Kansas 66604
(303) 867-7181
BJohnson@OneFPA.org
www.fpakc.org

CAREER LISTINGS

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

A WORD FROM THE CHAPTER DIRECTOR OF COMMUNICATIONS

by Jack Giardino, CFP®, Director of Communications

Hello all,

Can you believe we are almost to the halfway point of 2021? I sure can't!

As the Communications Chair for the FPA of Greater Kansas City, I wanted to take a moment to outline some of the wonderful resources that both our local chapter and national chapter have to offer.

The first resource, and our most important resource, is Brandy Johnson. If you haven't had the chance to meet Brandy, I would encourage you to stop and introduce yourself once we resume in person activities. Brandy is the Chapter Executive and the "glue" to our local chapter. If you ever have any questions regarding FPA Dues, Meeting Registration, CE Reporting, or anything National FPA related, Brandy will help point you in the right direction. She can be reached directly at BJohnson@OneFPA.org.

The next resource I would like to cover is www.fpakc.org. For those of you that have not visited our website we have an abundance of resources that are available to our members. I have outlined a few of these resources below:

- [Event Calendar](#) – Stay up to date with all upcoming events put on by FPA of Greater Kanas City.
- [Newsletters](#) – Did you miss the monthly newsletter? Find all previous newsletters here!
- [Partnerships](#) – Wanting to find strategic partners to take your client experience to the next level? Find opportunities for strategic partnerships here.
- [Women of FPA](#) – Looking to build relationships, share insight and promote the contributions of women in the Financial Planning industry? This link is for you!
- [Career Listings](#) – Looking to hire or wanting to take the next step in your career? Find all local career listings here.

The last resource I would like to outline is www.financialplanningassociation.org. Although, as a local chapter we try to keep all members up to date with what is going on at the national level, there are many resources that National FPA has to offer to all members:

- [Journal of Financial Planning](#) – Read award-winning content that is directly beneficial to all members of our industry.
- [National FPA Events & Conference](#) – Gather knowledge, share ideas, and build national and global relationships.
- [Continuing Education Opportunities](#) – Access live webinars, on-demand programs, and learn from top industry leaders.
- [Online Communities](#) – Meet and network with thousands of financial planning professionals.

As I close out this article, I want to ask you one question, are you getting the most of your FPA Membership? Make sure to take advantage of all the wonderful opportunities and resources that are offered to you!



Jack Giardino, CFP®

FPAGKC 2021 Director of Communications

2021 BOARD OF DIRECTORS



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Caliber Wealth Management



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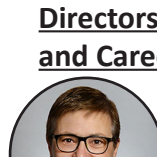
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Ben Skilling, CFP®
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Aspyre Wealth Partners



Directors of Student Mentoring and Career Development

Mary Dorn, MBA
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UMB



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



Chapter Executive

Brandy Johnson, CAE
FPA of Greater Kansas City

JUNE CHAPTER MEETING

THE SCIENCE OF INFLUENCE: SIMPLE WAYS TO GET YOUR CLIENTS TO TAKE YOUR BEST ADVICE

June 16, 2021

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



Daniel Crosby, Ph.D.

Chief Behavioral Officer, Orion

Registration:

Member \$15

Non Member \$29

Continuing Education:

CFP® - 1.5 hours approved

Kansas Insurance - 1 hour approved

Register Today: <https://fpakc.org/event-4141200>

SAVE THE DATE...

FPA OF GREATER KANSAS CITY SYMPOSIUM

August 24, 2021

Embassy Suites, Olathe

The FPA of Greater Kansas City First Annual Symposium will take place in-person on August 24, 2021 at the Embassy Suites Conference Center in Olathe. We are planning a day filled with industry networking, professional development, continuing education and skill building, all while supporting and promoting the great profession of financial planning. We plan to offer six hours of CFP CE. We are pleased to welcome Michael Kitces as the Symposium Keynote Speaker. Kitces will speak at two one hour general sessions as well as a limited ticketed VIP luncheon. Additional information coming soon!

If you are interested in sponsorship or exhibit opportunities please email Brandy Johnson, Chapter Executive, at BJohnson@onefpa.org or Ben Skilling, Programs Chair, at bskilling@waddell.com.

NEXGEN SCHOLARSHIPS AVAILABLE

The FPA of Greater Kansas City is offering scholarships for new and aspiring financial planners and registration to the NexGen Virtual Gathering!

We will award 10 membership scholarships to New Aspiring Financial Planners, which includes full-time students, CFP® Certificant students and CFP® Candidates. To apply please submit a copy of your completed membership application and dues receipt to Landon Warmund (NexGen Chair at lsw@reliantfin.com). Once approved, FPA of Greater Kansas City will reimburse the \$50 dues.

The FPA NexGen Gathering is taking place virtually August 12-13! Our Kansas City chapter would like to help NexGen members attend to represent Kansas City. For the four chosen, FPA of Greater Kansas City will cover the \$125 member registration fee. For more information on the event, visit the [FPA website](#). To apply, please complete the [application](#), and email back to Landon Warmund (NexGen Chair at lsw@reliantfin.com).

WELCOME NEW MEMBERS

Shelley Carver
Kellen J. Cross
Mack Willie Curry, III
Emily Dixon
Joshua Evans

Abby Foster, CFP®
Adam C. Hasty, CFP®
Chris M. Hunter
David Hutchins
LesliAnne Malcolm

Stacy Smith
Kale Terrill
Jason Yoxall

MEMBER MILESTONES

Michael Diederich-5 years
Taylor A. Graham-5 years
Nolan Keim-5 years

Lucy L. Williams, CFP®-15 years
William O. Woody, CFP®, CHFC-25 years
Wayne A. Henry, Jr., CFP®-40 years



American
Heart
Association®

Charity Begins at Home: Family Philanthropic Conversations with Clients

June 9, 2021 at 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 multi-generational 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

May 2021

FPA Has Raised its Advocacy Game to Help You Raise Yours

FPA is helping members keep their thumbs on the pulse of proposed legislation through the newly launched GovHawk platform. This new tracking system monitors legislation and regulation that FPA is tracking to help FPA members stay informed. From detailed summaries to FPA position statements, members can now stay up-to-date with the click of a mouse. For those measures that may have a consequential impact on financial planning and members' practices, FPA provides template letters members can send to their elected officials directly through the platform. Be sure your voice is heard by those with the power to influence your profession. [Access GovHawk now.](#)

Insurance Planning and Annuity Tools Free for FPA Members

FPA has partnered with Prudential to elevate the financial planning profession by changing and exploring the conversation around insurance planning and annuities as a part of a holistic financial plan. FPA members can now access free content like upcoming events and articles. Access to additional thought-leadership on this evolving area, including analyses from industry leaders like Wade Pfau and others, is also available. [View Prudential's content hub in the FPA Learning Center.](#)

What's New at FPA? Check Out the Latest FPA Quarterly 'Snapshot' to Find Out

FPA is pleased to share the first quarter 2021 'Snapshot' to keep you informed of FPA membership benefits and activities that support you and the financial planning profession. Each quarter, FPA reports on the most significant developments in member benefits and services in the areas of learn, lead and connect. [Access the Q1 2021 Snapshot now.](#)

Learn About Progress Made in Q1 2021 of the OneFPA Network Beta Test

With an eye on identifying ways FPA can elevate the member experience, the OneFPA Network beta test has been underway to assess ways FPA and chapters can better work together. The OneFPA Transition Task Force is pleased to offer a brief assessment report for Q1 2021. Stay tuned for upcoming reports that will delve into other critical areas of the beta test. [Review the Q1 2021 report.](#)

FPA NexGen Gathering: Registration is Now Open!

The financial planning profession is changing, and FPA NexGen planners are at the forefront of this change. The next generation of financial planners have the power to shape the future of the profession and pave the way for generations to come. Join FPA NexGen Gathering to get the skills, lasting connections and practical tools you need to be the change. [Register now](#) to join us for this highly-interactive virtual event taking place Aug. 12 – 13.

Stay on Top of The Latest News with Two Custom Newsletters

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 that delivers the latest headlines from CNBC. Also, subscribe for FPA SmartBrief to get the latest practice management, regulatory, and industry headlines delivered right to your inbox every Tuesday and Wednesday. [Sign-up for FPA SmartBrief today.](#)

Registration for the FPA Virtual Externship Is Now Open

The wildly popular [FPA Virtual Externship](#), which debuted last year as a way to fill the internship gap due to the pandemic, proved to be an experience we all need—not just in uncertain times, but in all times. Get an outstanding internship experience where you can earn 180 hours towards CFP Board's experience requirement, access top financial planning software platforms and get real-world experience—all from the comfort of your own home. In partnership with eMoney Advisor and Kaplan, the eight-week program will be held from June 7 through July 30. [Registration is now open until June 1.](#)

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 associationinsurancebenefits.com.



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STRATEGY CONSULTANTS
"Protecting Your Financial Plans Since 1978"

CHAPTER PLATINUM PARTNERS



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LearningQuest®
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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

CarePatrol

Cavanal Hill

UMB

BRONZE PARTNERS

BlueRock Capital Markets

Waddell & Reed

CALENDAR OF EVENTS

June 9, 2021

1:00-2:00 p.m.

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

June 10, 2021

5:00 p.m.

NexGen In-Person Happy Hour
KC Bier Company, 310 W 79th St, Kansas City, MO

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://fpakc.org/EventCalendar>