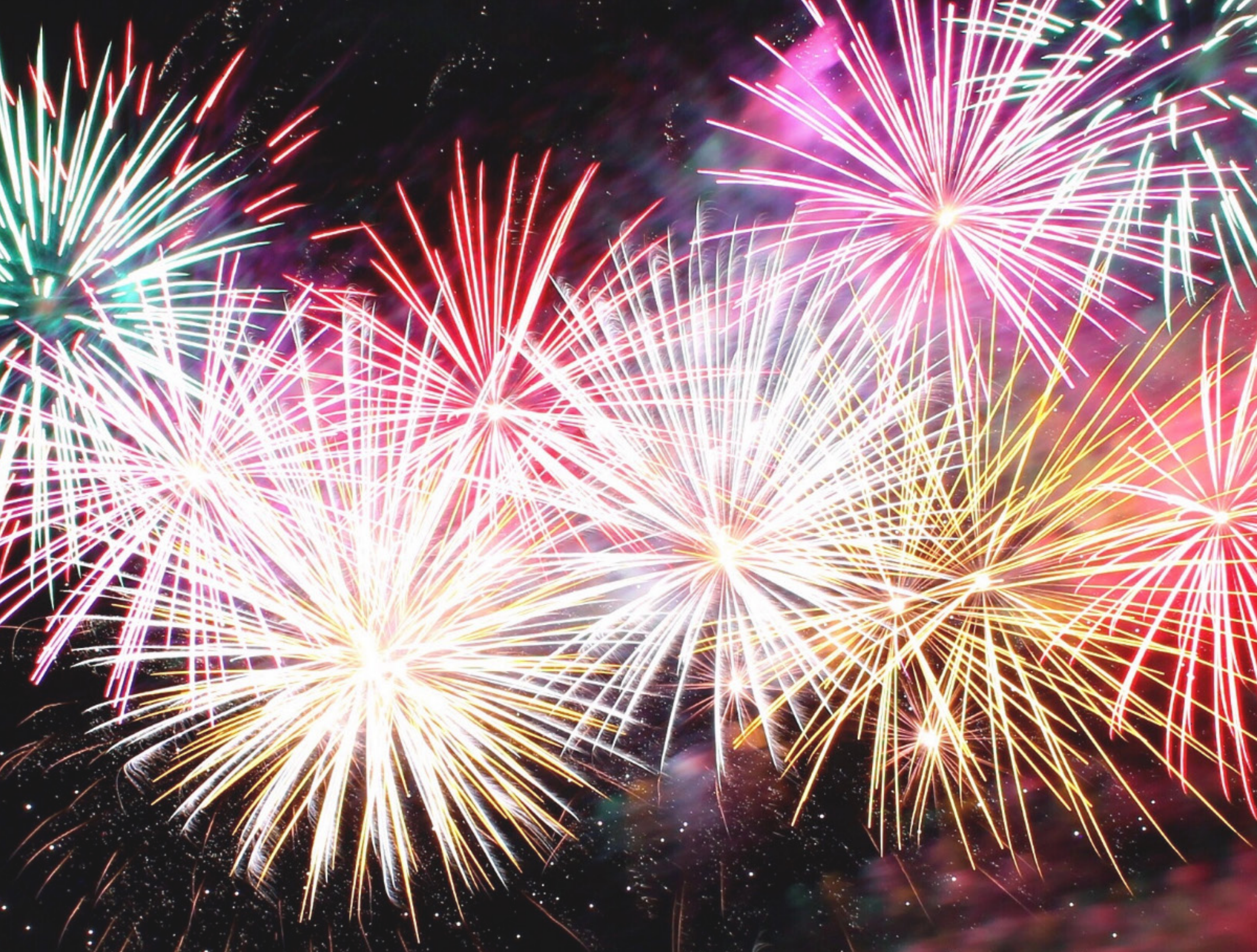
The Newsletter of FPA of Greater Kansas City

News&Views

June 2021



FINANCIAL PLANNING ASSOCIATION

GREATER KANSAS CITY

IN THIS ISSUE:

FPA of Greater Kansas City

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CAREER LISTINGS

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

MARRYING COMMUNITY OUTREACH WITH ADVOCACY EFFORTS

by Cole Foster, CFP®, Director of Government Relations

If you have ever been a part of an advocacy day in Topeka or Jefferson City, you are well aware of the fact that our profession is misunderstood. The old perception of the stockbroker racking up commissions by churning accounts or the insurance salesman who wrote the superfluous life insurance policy is alive and well. This misperception is a shame, because our profession is a noble endeavor with a focus on materially helping those we serve. Not only is the general public wary of our profession, but so too are those who are writing the laws and rules that govern how we operate.

Like most professions, Financial Planning is in need of extensive regulation to protect vulnerable clients from bad actors (and protect the reputations of those professionals who do things the right way). However, there is a lot of low-hanging, legislative fruit that we should consciously make an effort to grab… Such as:
https://www.financialplanningassociation.org/lead/advocacy

- The deductibility of financial planning fees for clients
- Protection of the CFP certification in specific states
- Excluding Financial Planners from the specified service trades or businesses that limit use of the Qualified Business Income (QBI) tax deduction

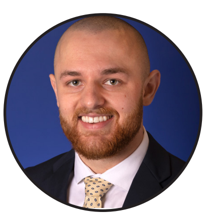
Among many others…

So how do we help our own cause on the advocacy front?

By proving our value in our immediate communities.

Those who are elected to office want to see the fruit of our labor in the communities of their constituents. By no means is this a call for financial planners to engage in a pay to play relationship with policy makers. Instead, it is the observation that we should not expect policy makers to be sensitive to the needs of our profession if we have done nothing fruitful in their communities.

Do you have an idea for how FPA of Greater KC can be serving our community? Would you like to participate in an advocacy day at your state's capital? Let us know! We would love to get you plugged in.



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FPAGKC 2021 Director of Government Relations

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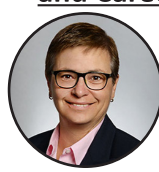

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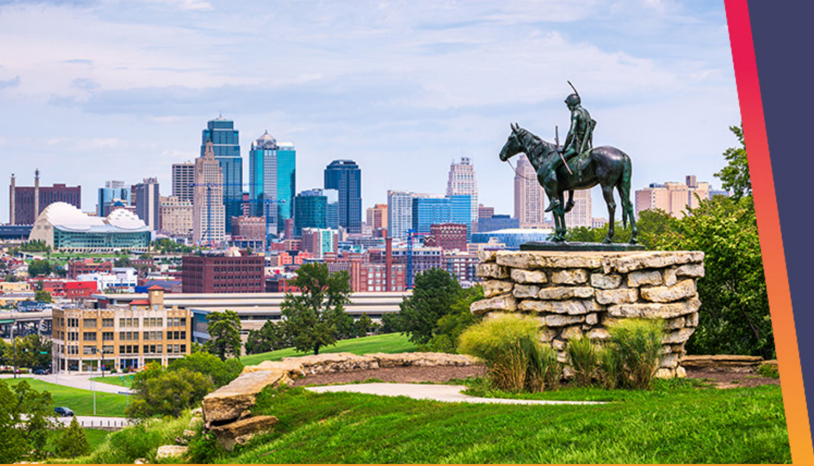

FINANCIAL PLANNING ASSOCIATION
GREATER KANSAS CITY

2021 FPA of Greater Kansas City Symposium

August 24, 2021
Embassy Suites-10401 S Ridgeview, Olathe, KS

The FPA of Greater Kansas City's 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 five 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.

SCHEDULE OF EVENTS

8:00 – 9:00 am	**Breakfast/Networking/Exhibit Hall**
9:00 -10:00 am	**General Session: Five Industry Trends Reshaping Financial Advice** Michael E. Kitces, MSFS, MTAX, CFP, CLU, ChFC, RHU, REBC, CASL
10:10 – 11:00 am	**Breakout Sessions**
11:00-11:30 am	**Break/Exhibit Hall Networking**
11:30 – 12:20 pm	**Breakout Sessions**
12:20-1:15 pm	**Lunch/Networking/Exhibit Hall** **Ticketed VIP lunch with Michael Kitces** Limited tickets will be sold benefiting the FPAGKC Scholarship Fund
1:15 – 2:15 pm	**General Session: Kitces Research on What Makes Financial Planning More Efficient** Michael E. Kitces, MSFS, MTAX, CFP, CLU, ChFC, RHU, REBC, CASL
2:30– 3:20 pm	**Breakout Sessions**
3:30- 4:20 pm	**Breakout Sessions**
4:20 – 5:30 pm	**Happy Hour/Networking/Exhibit Hall**

2021 FPA of Greater Kansas City Symposium

August 24, 2021

Embassy Suites-10401 S Ridgeview, Olathe, KS

REGISTRATION

	Before July 16	After July 16
Member	$179	$199
Non Member	$279	$299
Full Time Student	$99	$99

VIP Luncheon with Michael Kitces benefiting the FPAGKC Scholarship Program $150 (limited to first 12)

Registration includes continuing education, continental breakfast, lunch, breaks and social event.

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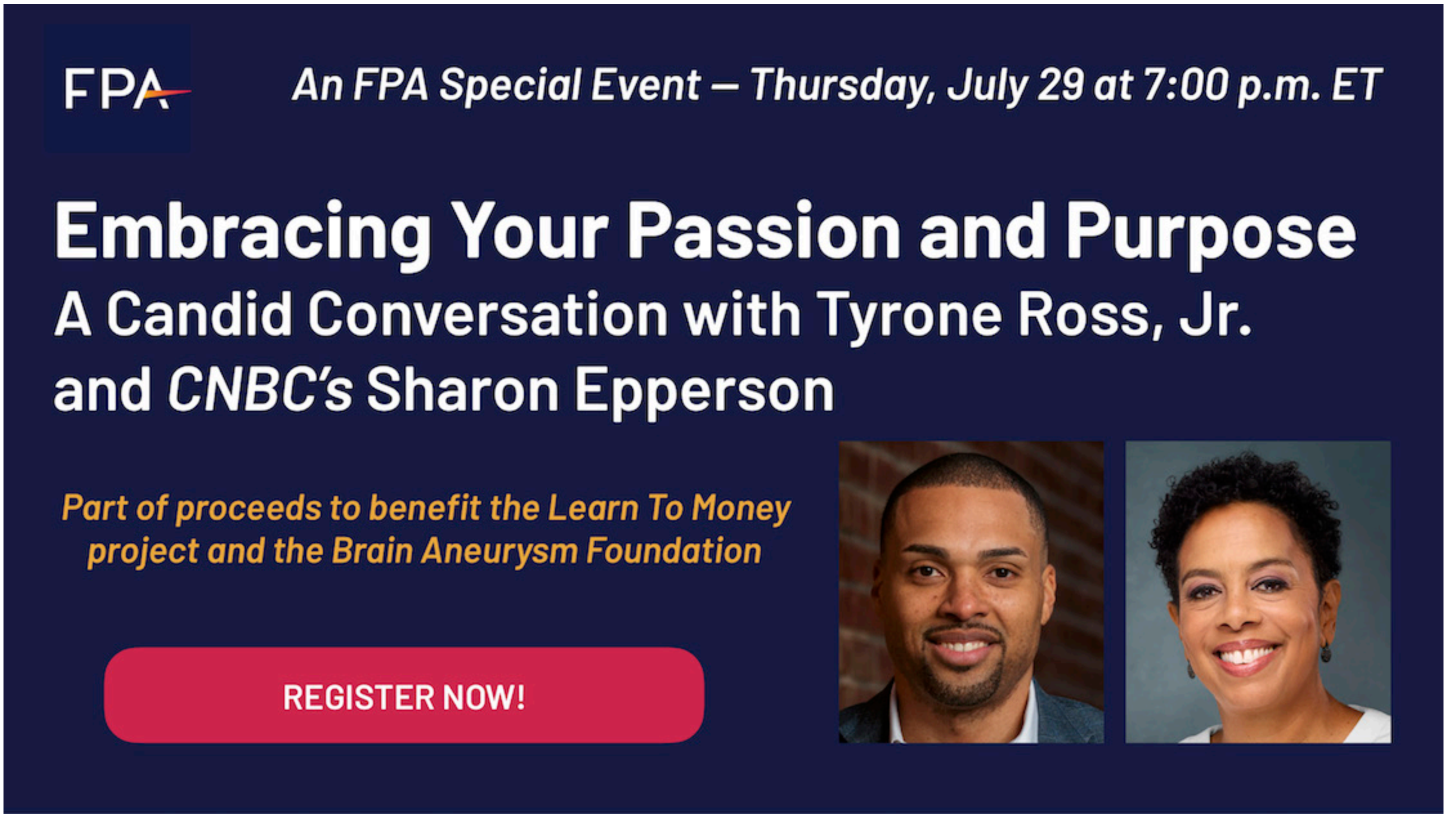
REGISTER TODAY!



We all strive to make our passions the focus of our daily lives and careers. Some have successfully made their passion part of their career in financial planning, while others may still be finding their way. No matter where you are in this profession, there is much we can learn from those who are using their personal experiences and passions as a force in their careers. If you want to learn how to embrace your passion and purpose, we have the event for you.

On Thursday, July 29 at 7:00 p.m. ET (4:00 p.m. PT), you and other FPA members from 11 select chapters across the country will take part in a candid conversation with Tyrone Ross, Jr., CEO of Onramp Invest, and Sharon Epperson, CNBC's senior personal finance correspondent. Tyrone and Sharon will share their personal stories and how their experiences helped them focus their lives and work on those issues that matter most to them. In addition, they will share their insights on how financial planners can identify their passions and how focusing on what matters most to you can transform your work and life.

The registration fee is $20/members and $40/nonmembers, with $5 from every registration going to the Learn To Money project and the Brain Aneurysm Foundation, two charities near and dear to Tyrone and Sharon.

REGISTER TODAY!

WELCOME NEW MEMBERS

Jonae Daniels
David Gourley, Financial Advisor
Kyle D. Strehlow

FPA

Take 5

June 2021

Register Today: 'State of FPA' Virtual Update Scheduled for July 8

What has FPA been doing over the past several months to serve our members and elevate the profession? What do the 2020 audited financial statements show about the financial health of the association? Join FPA leaders for a 'State of FPA' Virtual Update on July 8 at 3:30 p.m. ET to learn about the soon-to-be-released 2020 FPA Annual Report, how your membership association is doing today, and what is on the horizon. Register to attend.

Registration is Open for FPA Annual Conference 2021

The FPA Annual Conference is an immersive, three-day experience that will provide you what you need to pursue mastery in the business, practice and profession of financial planning. #FPAConf21 is where the profession's leaders, innovators and change-makers will gather to learn the latest in financial planning and share their secrets for success. Join your colleagues (in-person!), a diverse group of expert presenters from the profession and our difference-making partners, from September 22–24 at the Greater Columbus Convention Center in Columbus, Ohio to share insights on the topics that matter and participate in discussions that get to the heart of the important work you do every day. Early bird registration is now open with tremendous savings! Register today.

FPA Members: Register for Congressional Advocacy Day

For several years, FPA has held a DC Advocacy Day to provide FPA members and leaders an opportunity to meet personally with Members of Congress and Administration officials. This year the traditional Advocacy Day is being expanded to include FPA's Financial Planning Coalition (Coalition) partners, CFP Board and NAPFA. The Coalition is sponsoring a Congressional Advocacy Day on September 29 and all FPA members are encouraged to register. Since there is no fee to participate, taking part will only cost you your time and energy. Register by July 1!

New Research: Interest in Cryptocurrencies Increasing Among Advisers and Clients

FPA, the *Journal of Financial Planning*, and Onramp Invest just released annual research, the *2021 Trends In Investing Survey*, to show where financial advisers are investing today and where they plan to invest in the coming year. The Survey reveals that 14 percent of financial advisers are using or recommending cryptocurrencies today and that 26 percent plan to increase their use or recommendation over the next 12 months. Want to see what else is trending? Check out the 2021 Trends in Investing Survey report now.

Cybersecurity Breaches Can Cost You Millions: Protect Your Firm Against Cyber Attacks

To help financial planners protect data and comply with SEC and FINRA requirements, FPA offers *Cybersecurity for Financial Planners: An FPA Certificate Program*. The program, developed in partnership with FCI, guides financial planners through a step-by-step process to establish a customized cybersecurity plan that ensures financial planners are adopting reliable security measures that safeguard client data and provide a record of the firm's cybersecurity practices. Those completing the course will receive a digital certificate for accomplishment and have a compliant cybersecurity plan for their firm. CERTIFIED FINANCIAL PLANNER™ professionals completing the entire program will earn 2.5 CFP® CE credits. Register for the certificate program.

FPA Members Save 15% Off Eligible Kaplan, Inc. Programs

As an FPA member, you can save on various Kaplan, Inc. programs, including licensing exam prep, education programs for professional designations, CFP® certification and more. In addition, the College for Financial Planning®—a Kaplan Company offers scholarships to pursue CFP® certification, a professional designation, or a Master of Science Degree in Personal Financial Planning. Learn more.

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CALENDAR OF EVENTS

July 29, 2021
6:00 p.m.
Embracing Your Passion and Purpose:
A Candid Conversation with Tyrone Ross, Jr. and CNBC's Sharon Epperson
Virtual FPA Event

July 1, 2021
5:00 p.m.
NexGen In-Person Happy Hour
Boulevard Brewing Company Beer Hall
2534 Madison Avenue, Kansas City, MO

August 24, 2021
8:00 a.m.-5:00 p.m.
Chapter Symposium
Embassy Suites, Olathe

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