

The Newsletter of FPA of Greater Kansas City

# News & Views

July 2021



FPA

FINANCIAL  
PLANNING  
ASSOCIATION

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.

# A WORD FROM THE DIRECTOR OF PROGRAMS

by Ben Skilling, CFP®, Director of Programs

Greetings FPA Members,

Fans are returning to stadiums, students are returning to classrooms, passengers are cramming into the middle seats of airplanes excited for their first business trip of the year or their long overdue vacation, employees are returning to offices and most importantly, FPA members are returning to the Embassy Suites!

Let me start by saying thank you! We can't thank you enough for your continued support over the past year. Like every business, we too had to adjust. While we understand that virtual meetings are not always ideal, we still hope that you found value in your membership. It is always our goal, within the Programs Committee, to ensure we are providing you with valuable and timely content that can help in the growth of your business. With that said, we couldn't be more excited to welcome you back to in-person meetings starting with the FPA of Greater Kansas City's first annual Symposium on August 24th.

The 2021 FPA of Greater Kansas City Symposium is setting up to be the biggest industry networking and educational event in Kansas City for 2021. This full day event will be highlighted by keynote speaker Michael Kitces, where he will share his insights on the "Five Industry Trends Reshaping Financial Advice" and "What Makes Financial Planning More Efficient" across two one-hour general sessions. A full agenda can be found by clicking [here](#), but here are few other highlights:

- Choose from 12 additional breakout sessions focusing on relevant industry topics
- Networking with your peers and partners in the exhibit hall
- Exclusive ticketed luncheon with Michael Kitces (limited to 12)
- Breakfast, lunch and happy hour included
- Receive up to 5 CFP® credits

This event is limited so register now by clicking [here](#).

We always appreciate your feedback. If you have any programming ideas, topics or speaker recommendations please don't hesitate to reach out. Further, if you are interested in getting involved with the Programs Committee or any other committee for 2022 please let us know. We are always looking for passionate volunteers.

I look forward to seeing you all at the 2021 FPA of Greater Kansas City Symposium!



Many thanks,  
**Ben Skilling, CFP®**  
FPAGKC 2021 Director of Programs

# 2021 BOARD OF DIRECTORS



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## **Chapter Executive**

Brandy Johnson, CAE  
FPA of Greater Kansas City



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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. Five hours of CFP CE and Kansas Insurance CE have been approved.



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**

#### **KEYNOTE 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**

**1 hr CFP/1 hr KS Ins**

#### **Exploring Family Philanthropy: Engaging Your Clients' Next Generation**

Whitney Hosty, Senior Philanthropic Advisor

Chris Rigsby, Relationship Manager

Gwen Wurst, Senior Philanthropic Advisor

**Sponsored by:**



**1 hr CFP/1 hr KS Ins**

#### **Advanced Diversification: Theory and Reality for a Yield-Starved World**

Miguel Sosa, Research Strategist and Product Specialist

**Sponsored by:**



# 2021 FPA of Greater Kansas City Symposium

## SCHEDULE OF EVENTS

10:10 – 11:00 am  
1 hr CFP (pending)  
/1 hr KS Ins

**Valuation & Deal Structuring**  
Nick Parker, VP – Investment Advisory Lending

Sponsored by:



11:00–11:30 am

**Break/Exhibit Hall Networking**

11:30 – 12:20 pm

### **BREAKOUT SESSIONS**

1 hr CFP/1 hr KS Ins

**Mortgage Mindset Change For Retirees: Financial Planning and Home Equity For A Safer Retirement After 62**

Harlan Accola, National Reverse Mortgage Director

Sponsored by:



1 hr CFP/1 hr KS Ins

**Fear and Loathing in Fixed Income**

William Housey, Managing Director of Fixed Income

Sponsored by:



1 hr CFP/1 hr KS Ins

**Retirement Income Planning - Maximizing Portfolio Longevity with Dynamic Withdrawal Strategies**

William Meyer, Founder and CEO of Retiree Income

Sponsored by:



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

### **KEYNOTE SESSION**

1 hr CFP/1 hr KS Ins

**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**

1 hr CFP/1 hr KS Ins

**An Introduction to Semi-Transparent Active ETFs**

Ed Rosenberg, Senior Vice President and Head of Exchange-Traded Funds (ETFs)

Sponsored by:



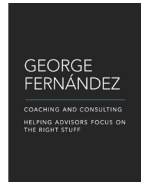
# 2021 FPA of Greater Kansas City Symposium

## SCHEDULE OF EVENTS

2:30– 3:20 pm  
1 hr CFP/1 hr KS Ins

**Bridging the Gap – of Intergenerational Communication**  
George Fernandez, MBA, CFP®, Financial Advisor Coach and Consultant

Sponsored by:



1 hr CFP/1 hr KS Ins

**Regulation Best Interest: Turning Challenges into Opportunities**  
Hilary Katz, Onboarding Coach

Sponsored by:



3:30– 4:20 pm

### BREAKOUT SESSIONS

1 hr CFP/1 hr KS Ins

**How to Use Fact-Based Risk Capacity to Protect Your Firm From Regulations**

Larry Shumbres, CEO of TIFIN Group/Totum Risk

Sponsored by:



1 hr CFP/1 hr KS Ins

**Peering Into the Future and Demystifying Monte Carlo Simulations**  
Raymond Shirley

Sponsored by:



1 hr CFP/1 hr KS Ins

**Planning Strategies for a Changing Tax Environment**  
Jeff Hess

Sponsored by:



4:20 – 5:30 pm

**Happy Hour/Networking/Exhibit Hall**

5:30 pm

**Adjourn**



# 2021 FPA of Greater Kansas City Symposium

## MEET THE SPEAKERS

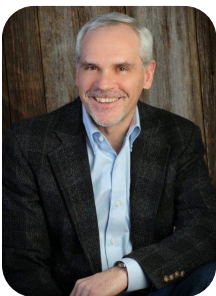
### KEYNOTE SPEAKER



**MICHAEL E. KITCES., MSFS, MTAX, CFP®, CLU, CHFC, RHU, REBC, CASL**

Michael E. Kitces is the Head of Planning Strategy at Buckingham Wealth Partners, an independent RIA with more than \$50 billion of assets under management, that provides private wealth management to consumers and turnkey asset management platform services to advisors.

In addition, he is a co-founder of the XY Planning Network, AdvicePay, New Planner Recruiting, fpPathfinder, and FA BeanCounters, the former Practitioner Editor of the Journal of Financial Planning, the host of the Financial Advisor Success podcast, and the publisher of the popular financial planning industry blog Nerd's Eye View through his website Kitces.com, all dedicated to advancing knowledge in financial planning and making financial advisors better and more successful.



**Harlan Accola** has been in the mortgage industry for over 20 years and has worked with all types of loans. His specialty and favorite has always been working amongst the 62 plus age group with over 1,000 Reverse Mortgages which has been the most rewarding part of his career. He is now the National Reverse Mortgage Director for Fairway Independent Mortgage Corporation. The goal of Harlan and Fairway Independent Mortgage Corporation is to change the way retirement is done for baby boomers in this country. There is a perfect storm and a retirement crisis that can be avoided if we properly manage the trillions of dollars in home equity. Harlan and his wife, Brenda, have lived in the Marshfield, WI area for over 30 years. They have four grown sons; Ben, Josh, Luke, and Isaac.



**George Fernández, MBA, CFP®** is financial advisor coach and consultant with over 36 years of experience helping clients and advisors achieve personal and business success by focusing on the right stuff at the right time in the right way to achieve the right results. With more than 20 years of experience in financial planning, George is the founder of George Fernandez Coaching and Consulting. Over his career, George has guided advisors and national wealth advisory firms that provides holistic, innovative, and client-focused solutions. His experience as a financial planning practitioner and corporate leader provide a unique perspective

that can help lead financial advisors into the future. George received his Bachelor and Master of Business Administration degrees at MidAmerica Nazarene University in Olathe, Kan. George has held numerous volunteer positions within FPA and the FPA of Greater Kansas City, including CLC Development Committee member, OneFPA Transition Task Force member, and president and chair of the board of directors for his local chapter. George Fernández, MBA, CFP®, currently serves on the Board of Directors of the Financial Planning Association® (FPA®), the principal membership organization for CERTIFIED FINANCIAL PLANNER™ professionals and those who support the financial planning process.



# 2021 FPA of Greater Kansas City Symposium

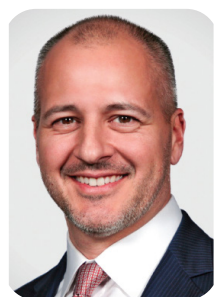
## MEET THE SPEAKERS



**Jeff Hess** is an RIA Consultant for Palladium Group. Jeff partners with RIAs, family offices, and other fee-only advisors for consultation, expert analysis, and implementation and management of insurance-based financial solutions. With more than 20 years' experience in the financial services industry, Jeff provides unique, independent services that raise the bar among insurance professionals. His goal is to change the experience of obtaining insurance—to make the process personal and enjoyable for advisors and their clients. Excellence, trust, and collaboration are the foundation of his work.



**Whitney Hosty** is a Senior Philanthropic Advisor for the Greater Kansas City Community Foundation, where she oversees donor education programs and works closely with families and private foundations to focus and guide their philanthropic investments. She has earned the Chartered Advisor in Philanthropy® certification and is also a 21/64 Certified Advisor. These trainings help her to better serve the donors she works with. Whitney earned a Bachelor of Arts in French studies and a concentration in leadership studies from Williams College in Williamstown, Mass. She currently serves on the Board of Trustees at St. Paul's Episcopal Day School and is president of the Williams College Regional Alumni Association.



**William Housey, CFA** joined First Trust Advisors L.P. in June 2010 as the Senior Portfolio Manager for the Leveraged Finance Investment Team and has over 24 years of investment experience. Bill is a Managing Director of Fixed-Income and is also a member of the First Trust Strategic Model Investment Committee and the Fixed-Income Sub-Committee. Prior to joining First Trust, Bill was at Morgan Stanley Investment Management and its wholly owned subsidiary, Van Kampen Funds, Inc., for 11 years where he last served as Executive Director and Co-Portfolio Manager. Bill has extensive experience in the portfolio management of both leveraged and unleveraged credit products, including senior loans, high-yield bonds, credit derivatives and corporate restructurings. Bill received a BS in Finance from Eastern Illinois University and an MBA in Finance as well as Management and Strategy from Northwestern University's Kellogg School of Business. He holds the FINRA Series 7, Series 52 and Series 63 licenses. Bill also holds the Chartered Financial Analyst designation. He is a member of the CFA Institute and the CFA Society of Chicago. Bill also serves on the Village of Glen Ellyn, IL Police Pension Board.



**Hilary Katz** is an Onboarding Coach at Riskalyze. Riskalyze is the company that invented the Risk Number™ and was twice named as one of the world's 10 most innovative companies in finance by Fast Company Magazine. Hilary is a creative, customer-centric problem-solver who helps guide and coach new users as they embark on their journeys using Riskalyze. Hilary is a high-performing, enthusiastic leader and travels frequently to represent Riskalyze in speaking engagements across the country.

# 2021 FPA of Greater Kansas City Symposium

## MEET THE SPEAKERS



**William (Bill) Meyer**, Founder and CEO of Retiree Income, is a nationally recognized expert in tax-efficient retirement income withdrawal strategies and Social Security claiming strategies. He developed Income Strategy and Social Security Solutions, the leading retirement income planning software for pre-retirement and in-retirement individuals. Meyer is a popular speaker and has been featured at numerous national events such as Financial Planning Association, Association of Independent Certified Public Accountants, and the Million Dollar Roundtable. Additionally, he was invited to provide testimony on retirement matters to the U.S. Senate Special Committee on Aging. In 2021, he was a Icon and Innovation Award Winner from Investment News. Meyer earned his Bachelors of Science degree in Psychology from UCLA and his MBA degree from the Anderson School at UCLA. He is a former Trustee of the Securities Industry Institute at Wharton.



**Nick Parker** graduated from the University of North Carolina Wilmington with a concentration in Finance and Marketing. He is in the process of getting his MBA from the University of North Carolina Chapel Hill. He joined Live Oak Bank in 2014 as a Loan Closing Specialist where he gained an appreciation and skill for coordinating the various parties involved to make deals happen on tight timelines. Nick also worked as an underwriter where he analyzed financials and worked directly with Live Oak's credit team to get financing opportunities approved. Now, as VP on Live Oak's Investment Advisory Lending team, he works with clients from their first conversation through closing and funding. His knowledge of the investment advisory industry makes him a great partner for advisors looking to grow or sell their business.



**Chris Rigbsy** is a Relationship Manager for the Greater Kansas City Community Foundation, where he works with financial advisors and other professional advisors to help them make the most of their clients' charitable dollars. Chris also serves as the contact for national relationships. He has earned the Chartered Advisor in Philanthropy® certification. Chris earned a Bachelor of Arts in Language and World Business with a concentration in Spanish at the University of Tennessee.



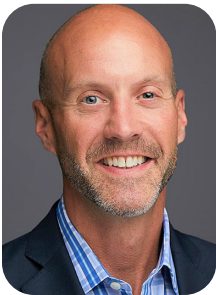
**Ed Rosenberg** is senior vice president and head of exchange-traded funds (ETFs) for American Century Investments®, a premier investment manager headquartered in Kansas City, Missouri. In his role, Ed is responsible for leading and executing the strategy for the American Century Investments and Avantis Investors® ETFs. Prior to joining American Century Investments in 2017, Ed was a senior vice president and head of ETF capital markets and analytics at Northern Trust's FlexShares. Previously, he was director and head of capital markets and analytics at Russell Investments. He began his career in ETFs as an ETF product manager at Vanguard. Ed received a bachelor's degree in business administration from Muhlenberg College and a master's degree in business administration from Pennsylvania State University. He speaks regularly at industry conferences and has appeared on Bloomberg Television, CNBC, Fox Business, Bloomberg Radio and The RIA Channel. He is often quoted in financial print media outlets, offering insights on the ETF industry.

# 2021 FPA of Greater Kansas City Symposium

## MEET THE SPEAKERS



**Raymond Shirley** has served in the financial planning space for over a decade as a financial planner and financial technology expert. His current role as a subject matter expert of financial planning allows him to serve Orion's nearly three thousand advisory firms, helping them leverage Orion Planning, formerly Advizr. He is a past board of director for the FPA of Nebraska chapter and has led the NexGen efforts in Omaha. His passion at Orion stems from working on cutting edge financial technology with firms that care about providing the best financial advice and experience to their clients. Ray is a Kansas City native and enjoys talking soccer.



**Larry Shumbres** is a leader in the FinTech industry with a mission to continuously enhance the investing experience for both advisors and investors through innovative technology. He has over 20 years of FinTech experience with companies such as Charles Schwab, Morningstar, and eVestment and is recognized as an industry expert. After a major life event prompted Larry to evaluate his investment risk, he discovered that traditional risk tools were only calculating risk preference instead of risk capacity. Motivated by this finding, Larry founded Totum, a risk toolkit that calculated both risk preference and risk capacity and compared it to the risk score of the investor's current portfolio. After successfully selling Totum to The Tifin Group, Larry continues to lead the company. As a trusted advisor, Larry serves on multiple corporate boards, is a writer for NASDAQ, has authored numerous articles, and has been interviewed on Bloomberg Radio. He is also the founder of Greenback Investments, a hedge fund developing digital assets through blockchain technology. Larry played football for The University of Pittsburgh where he graduated with a Bachelor of Arts degree in Law.



**Miguel Sosa** is Research Strategist and Product Specialist at Bluerock. Miguel focuses on Bluerock's Total Income Fund and works alongside the portfolio management team to specifically support client-centric initiatives. This includes acting as the research team representative to clients by presenting to and providing updates to the firm's largest clients, and introducing investment strategies to prospective clients. Additionally, Miguel works with senior management and portfolio teams to author institutional research pieces on topics such as alternative products, optimal asset allocation, and proper portfolio construction. Prior to joining Bluerock, Miguel worked at Artivest (formerly Altegris) where he held a role as a Portfolio Strategist. Previously, Miguel spent six years as a Hedge Fund Portfolio Specialist at Wellington Management. Prior to Wellington, Miguel worked at Fidelity Investments and as a Systems Engineer at Raytheon Company. Miguel has a dual M.B.A. and MS in Engineering from the Massachusetts Institute of Technology and a BS in Industrial & Systems Engineering (cum laude) from University of San Diego.



**Gwen Wurst** is a Senior Philanthropic Advisor for the Greater Kansas City Community Foundation, where she helps develop custom giving solutions for multigenerational families and works with private family foundations to facilitate their strategic grantmaking. She is a 21/64 Certified Advisor and has walked alongside donors carrying out their philanthropic missions for over 25 years. Gwen earned a Bachelor of Arts in English with a concentration in communications at St. Olaf College in Northfield, Minn. She currently serves on the board of directors of the Henry E. Wurst Family Foundation.



# 2021 FPA of Greater Kansas City Symposium

August 24, 2021

Embassy Suites-10401 S Ridgeview, Olathe, KS

## REGISTRATION

**Member** \$199

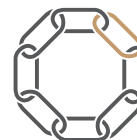
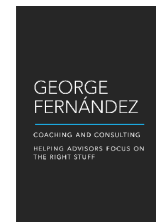
**Non Member** \$299

**Full Time Student** \$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.

## SPONSORS AND EXHIBITORS



by TIFIN

**REGISTER**  
**TODAY!**

## Inflation, Shutdowns, Spending

Someone once said, “technology has never moved this fast, and at the same time, will never move this slow again.” So true! A partial list of recent technological advances includes: messenger RNA (mRNA) gene therapies, 5G wireless, blockchain, the cloud, low orbit communication satellites (Starlink), vertical indoor farming, and much more.

At the same time, the government in the United States has never been larger or more intrusive. This makes economic forecasting and investing a balancing act between the “supply side” of new technology and the “demand side” of government intervention.

Case in point is the Federal Reserve, which meets this week. The Fed is far less concerned than it should be about falling behind the curve on inflation. As a result, we don’t expect any significant changes to monetary policy.

Obviously, the Fed is still a long way off from raising short-term interest rates. But, as we explained as far back as mid-June when the 10-year Treasury Note yielded roughly 1.5%, financial markets are much better prepared for an announcement about tapering and the eventual end of quantitative easing than they were back in 2013 under Fed Chair Ben Bernanke, when we witnessed the “taper tantrum.” In other words, we think the Fed will continue to kick the can down the road, though it shouldn’t.

The consumer price index is up 5.4% versus a year ago and up at a 3.5% annualized rate since February 2020, pre-COVID. The Fed’s preferred measure of inflation is the PCE deflator. We think this was up about 0.7% in June (to be reported Friday). If so, this inflation measure is up 4.1% from a year ago and up at a 2.9% annualized rate versus February 2020. Yes, some of this inflation represents temporary supply-chain issues. But it also reflects overly loose monetary policy. The M2 measure of the money supply has soared 32% since COVID hit, something that didn’t happen during or after the Financial

Crisis in 2008-09. Those assuming inflation gets back to a roughly 2.0% trend in 2022 are in for a rude awakening.

But inflation shouldn’t be our only government worry. Even though hospitalizations and deaths remain way down versus previous spikes, the media has been amplifying any negative news it can find on the “Delta” variant and we can’t casually dismiss the possibility that some places around the country are going to re-tighten limits on economic activity and schools later this year.

Our best guess, though, is that the hurdle to re-imposing strict limits is going to be very high. Republican states have generally supported looser restrictions, while Democratic states more often supported tighter restrictions. With elections right around the corner, there are reasons to expect a less restrictive response on average.

Meanwhile, policymakers are fighting about two measures to increase federal spending over the next several years. The first measure is a bipartisan infrastructure deal to raise spending by about \$1 trillion, although some of the spending may be repurposed from other programs. No guarantees, but our best guess is that this measure eventually dies.

The other measure would be a purely partisan Democrat effort to boost spending by up to \$3.5 trillion over the next several years. The momentum behind this effort is waning because the US has already pushed through nearly \$5 trillion in spending bills during the pandemic and it only takes one “no” vote from a Democratic senator to kill it. However, Democrats have a great deal of political capital invested in the idea of “human infrastructure” and tax hikes, and this legislation is far from dead.

The economy is healing rapidly, the bull market remains intact and technology is raising potential future growth. But, government actions could undermine these positive trends. For now, we remain bullish.

Date/Time (CST)	U.S. Economic Data	Consensus	First Trust	Actual	Previous
7-26 / 9:00 am	New Home Sales – Jun	0.796 Mil	<b>0.802 Mil</b>	<b>0.676 Mil</b>	0.769 Mil
7-27 / 7:30 am	Durable Goods – Jun	+2.0%	<b>+2.6%</b>		+2.3%
7:30 am	Durable Goods – Jun	+0.8%	<b>+0.4%</b>		+0.3%
7-29 / 7:30 am	Initial Claims - Jul 20	382K	<b>380K</b>		419K
7:30 am	Q2 GDP Advance Report	8.5%	<b>8.3%</b>		6.4%
7:30 am	Q2 GDP Chain Price Index	5.4%	<b>4.9%</b>		4.3%
7-30 / 7:30 am	Personal Income – Jun	-0.4%	<b>-1.0%</b>		-2.0%
7:30 am	Personal Spending – Jun	+0.7%	<b>+0.5%</b>		0.0%
8:45 am	Chicago PMI	64.0	<b>69.0</b>		66.1
9:00 am	U. Mich Consumer Sentiment- Jul	80.8	<b>81.0</b>		80.8

# OSTERWEIS

CAPITAL MANAGEMENT



## Osterweis Emerging Opportunity Fund (OSTGX)



We Invite You to Learn Why  
Morningstar Magazine Highlighted  
Jim Callinan as an Undiscovered Manager.

Visit [www.osterweis.com](http://www.osterweis.com) or call Sean Ryan,  
Regional Investment Consultant, at (312) 560-7300.

The Fund was rated 5 Stars against 576 funds Overall, 5 Stars against 576 funds over 3 Years in the Small Growth category based on total returns as of 6/30/21.

The Morningstar Rating™ for funds, or “star rating,” is calculated for mutual funds, variable annuity and variable life subaccounts, exchange-traded funds, closed-end funds, and separate accounts) with at least a three-year history. Exchange-traded funds and open-ended mutual funds are considered a single population for comparative purposes. It is calculated based on a Morningstar Risk-Adjusted Return measure that accounts for variation in a managed product's monthly excess performance, placing more emphasis on downward variations and rewarding consistent performance. The top 10% of products in each product category receive 5 stars, the next 22.5% receive 4 stars, the next 35% receive 3 stars, the next 22.5% receive 2 stars, and the bottom 10% receive 1 star. The Overall Morningstar Rating for a managed product is derived from a weighted average of the performance figures associated with its three-, five-, and 10-year (if applicable) Morningstar Rating metrics. The weights are: 100% three-year rating for 36-59 months of total returns, 60% five-year rating/40% three-year rating for 60-119 months of total returns, and 50% 10-year rating/30% five-year rating/20% three-year rating for 120 or more months of total returns. While the 10-year overall star rating formula seems to give the most weight to the 10-year period, the most recent three-year period has the greatest impact because it is included in all three rating periods. The Osterweis Emerging Opportunity Fund does not have a five-year Morningstar rating at this time.

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*The Osterweis Funds are available by prospectus only. The Funds' investment objectives, risks, charges and expenses must be considered carefully before investing. The summary and statutory prospectuses contain this and other important information about the Funds. You may obtain a summary or statutory prospectus by calling toll free at (866) 236-0050, or by visiting [www.osterweis.com/statpro](http://www.osterweis.com/statpro). Please read the prospectus carefully before investing to ensure the Fund is appropriate for your goals and risk tolerance.*

**Mutual fund investing involves risk. Principal loss is possible.**

Osterweis Capital Management is the adviser to the Osterweis Funds, which are distributed by Quasar Distributors, LLC.  
[OSTE-20210721-0295]





# Take 5

July 2021

## Now Available: The 2020 FPA Annual Report

FPA is pleased to announce the availability of the 2020 FPA Annual Report covering the work of the Association in 2020, and including last year's audited financial statements, an update on the OneFPA Network beta test, and more. Get caught up on how your Association is working for you and the profession. [Check out the Annual Report now.](#)

## The Breakout Sessions You Need at FPA Annual Conference 2021

We're excited to be counting down the days until [FPA Annual Conference 2021](#)! This week, we are highlighting a few [breakout speakers](#): Rianka Dorsainvil, CFP®, Robert Sofia, Jean Dunn, CFP®, and Lawrence Pon, CFP®, CPA, EA, USTCP, AEP®. Each speaker will have a unique presentation that provides new insight and provokes discussion among your peers. We can't wait to see you September 22-24 in Columbus, Ohio! [Register today!](#)

## The Journal of Financial Planning: Access Anytime, Anywhere

For more than four decades, the award-winning *Journal of Financial Planning* has published cutting-edge financial planning research and insights. Financial planners of all backgrounds have depended on the *Journal* to help them build their professional competencies and stay up-to-date on the latest trends and practices. The *Journal's* high-quality content is now available on all your devices. [Get anytime access to the Journal](#) now to get caught up on all you need to be the best financial planner you can be.

**Did You Miss the July 8 'State of FPA' Virtual Update? Check Out the Recording!**

All FPA members were invited to join FPA leaders for a 'State of FPA' Virtual Update on July 8 to learn about the just released 2020 FPA Annual Report, the organization's recent audited financial statements, how your membership association is doing today, and what is on the horizon. Attendees also engaged in a vibrant Q&A with FPA President Skip Schweiss, FPA CEO Patrick Mahoney, and other leaders. [View the recording.](#)

**Registration Deadline Alert: FPA NexGen Gathering!**

The registration deadline for [FPA NexGen Gathering](#) is July 19, so now is the time to register for the virtual event taking place August 11-13! Don't miss out on the connections, learning, and camaraderie that comes with attending. Register now to participate in this one-of-a-kind gathering of the next generation and see what you need to do to take your career – and the profession – to the next level. [Register now!](#)

**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.](#)

**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](https://associationinsurancebenefits.com).



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# FPA Marketplace

Your FPA membership now unlocks thousands of dollars in savings on hundreds of products and services.

*Powered by Chalice Network®*



## FPA Announces Marketplace for Members!

We are pleased to announce the all-new FPA Marketplace powered by the Chalice Network® is now available to our valued FPA members.

The FPA Marketplace is your place to get hundreds of services and products at significant discounts. Through the Marketplace, you can access many benefits designed for FPA members, especially our various insurance programs. In addition, you can now access BenefitHub that offers you potentially thousands of dollars in savings on a wide range of services and programs from top companies like Verizon, Costco, Geico, Avis, Hertz, Disney, AMC, Gap, and many more.

Access the new FPA Marketplace now by simply using your FPA credentials and let the savings begin!

**[Visit the Marketplace Today!](#)**

## WELCOME NEW MEMBERS

Andy Draper  
Chris Rett  
David Sprick, ChFC, CLU  
Tyson Sprick, CFP®

# CALENDAR OF EVENTS

**August 5, 2021**

7:30-9:30 a.m.

**NexGen In-Person Roundtable**

**Caliber Wealth Management**

6201 College Blvd. Suite 650 Overland Park, KS 66211-2427

**August 24, 2021**

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

**Chapter Symposium**

**Embassy Suites, Olathe**

**September 2, 2021**

3:00 p.m.

**Embracing Your Passion and Purpose:**

**A Candid Conversation with Tyrone Ross, Jr. and CNBC's Sharon Epperson**

**Virtual FPA Event**

**September 23, 2021**

8:30-10:30 a.m. (breakfast included)

**Retirement Planning: Senior Living Options and Associated Costs**

**Sponsored by: CarePatrol**

BridgeSpace: 210 SW Market St, Lee's Summit, MO 64063

**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>