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. 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: Greater Kansas City Community Foundation℠

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: BLUEROCK™ CAPITAL MARKETS LLC

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10:10 – 11:00 am **1 hr CFP (pending)** **/1 hr KS Ins**	**Valuation & Deal Structuring** Nick Parker, VP – Investment Advisory Lending Sponsored by: LiveOak Bank
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: FAIRWAY INDEPENDENT MORTGAGE CORPORATION NMLS#2289; REVERSE MORTGAGE PLANNER
1 hr CFP/1 hr KS Ins	**Fear and Loathing in Fixed Income** William Housey, Mananging Director of Fixed Income Sponsored by: First Trust
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: Income Solver
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 **1 hr CFP/1 hr KS Ins**	**KEYNOTE 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**
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: American Century Investments®; LearningQuest® 529 Education Savings Program

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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**

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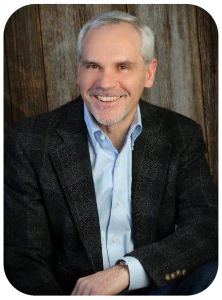
KEYNOTE SPEAKER

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.

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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.

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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 Rigsby 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.

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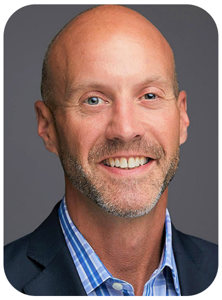
Raymond Shirley has served in the financial planning space for over a decade as a financial planner and financial technology expert. His current role as a subject matter expert of financial planning allows him to serve Orion's nearly three thousand advisory firms, helping them leverage Orion Planning, 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.

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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.

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