The Newsletter of FPA of Greater Kansas City

News&Views

September 2021

FPA

FINANCIAL PLANNING ASSOCIATION

GREATER KANSAS CITY

IN THIS ISSUE:

FPA of Greater Kansas City

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

CAREER LISTINGS

Visit the FPA of Greater Kansas City Careers Page
for a full list of available positions.

A WORD FROM THE DIRECTOR OF PARTNERSHIPS

by Jeff Hrabe, CMFC, Director of Partnerships

Hello FPA Members,

The arrival of Fall is undoubtedly one of my favorite times of the year. The changing leaves mean cooler temperatures are on the way, kids are back in school, and the Chiefs are playing football each weekend! Fall is also a time when budget decisions for the upcoming year are made by many of our Partners and prospective partners of FPA. This makes it an important time of year for the Partnerships Committee to renew existing commitments and to also reach out to prospective businesses who would like to be involved with FPA.

As I'm sure you know, the revenue from these partnership commitments (combined with Chapter memberships) is vital to bring you quality content during Chapter meetings and other events. As much as that revenue means to our Chapter, one-sided relationships rarely work. The key to attracting and retaining our partners is in making sure that there is a mutual benefit for BOTH parties. So how can you help our Chapter retain and attract strong Partners?

- Engage with Partner firm representatives at FPA events. I promise they won't bite, and you might be surprised at how much you can glean from their industry experience! More than anything, these representatives tell me that they just want to make new connections.

- Consider relationships that your firm has with its outside vendors. Would other FPA members benefit from getting to know your firms' strategic partners? If so, let anyone on the Board know! A warm introduction might be the boost your vendor needs. You can share our Partnership brochure with them here.

- Thank those Partners who have given their time and dollars to support FPA. Even if you aren't able to send them business, let them know that you appreciate their support.

I feel very fortunate to have built numerous relationships over the past 6 years through my firms' FPA Partnership. Many of those relationships have had little (or nothing) to do with the investments that I represent, but they have led to meaningful connections that will ultimately help me to reach my business and personal goals. Wouldn't it be great to be a part of a connection like that which lasts for years?!

All the best,

Jeff Hrabe, CMFC

FPAGKC 2021 Director of Partnerships

2021 BOARD OF DIRECTORS

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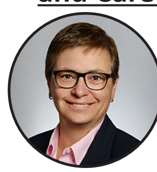

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Chapter Executive
Brandy Johnson, CAE
FPA of Greater Kansas City

UPCOMING CHAPTER MEETINGS

OCTOBER 20, 2021

11:30 am - 2:00 pm

Embassy Suite-10401 S. Ridgeview Rd, Olathe, KS 66061

Integrating Client Psychology into Your Practice

Martin Seay, Ph.D., CFP®

Kansas State University

2021 FPA Chair

Crypto/Bitcoin

Tyrone V. Ross, Jr.

CEO, Onramp Invest

Founder, 401STC

THIS MEETING SPONSORED BY:

[Additional information and registration!]

NOVEMBER 17, 2021

3:00 - 5:00 pm

Embassy Suite-10401 S. Ridgeview Rd, Olathe, KS 66061

Advising Clients through the Toughest Times of Life

Amy Florian

CEO, Corgenius

[Additional information and registration!]

TWO KANSAS COLLEGE TEAMS NAMED FINALISTS IN THE 2021 FINANCIAL PLANNING CHALLENGE

The Financial Planning Association® (FPA®), Ameriprise Financial, and the Certified Financial Planner Board of Standards, Inc. (CFP Board) have announced the college teams that will compete in the final stages of the 2021 Financial Planning Challenge. Congratulations to Kansas State University and Fort Hays State University for being chosen amongst eight teams. The competition, jointly sponsored by the three organizations, is designed exclusively for college and university financial planning undergraduate degree programs registered with CFP Board through a three-stage event. The first two phases are modeled after CFP Board's Financial Plan Development (Capstone) Course requirement.

The Financial Planning Challenge aims to promote the financial planning profession as a vibrant community and viable career choice for today's students. The competition involves students in a holistic financial planning learning experience. It engages them in the financial planning community to build relationships, discover career opportunities, and enhance their financial planning knowledge. This year, the following eight teams are advancing to the final rounds of the Financial Planning Challenge to be held virtually Sept. 21-23:

- Edinboro University
- Fort Hays State University
- Illinois State University
- Kansas State University
- Purdue University
- Texas Tech University
- University of Arizona
- Western Kentucky University

"This wonderful competition has been an opportunity to showcase today's students who are also the profession's leaders of tomorrow," says Patrick D. Mahoney, chief executive officer of FPA. "We are honored to once again have this partnership with our friends at Ameriprise Financial and CFP Board so we can shine a bright light on these students and the amazing futures they have in financial planning."

"CFP Board is proud to co-sponsor the Financial Planning Challenge," said CFP Board CEO Kevin R. Keller, CAE. "Since the Challenge's inception in 2014, we continue to be impressed by students' leadership and financial planning skills exhibited at the Challenge. These students possess dedication, professionalism, integrity and emotional intelligence that will certainly make them the next generation of leaders of the financial planning profession."

Teams advance in the challenge by competing in the following three phases:

1. Written financial planning case study (complete)
2. Case study presentation (Sept. 21-22)
3. "How Do You Know?" Challenge, a game-show style financial planning knowledge contest (Sept. 23)

Good luck teams!

FPA

Take 5

September 2021

FPA Residency Can Help You Become the Financial Planner You Want to Be

There is no better way to gain the confidence and skill of a seasoned professional than to experience FPA Residency 2021 at the Hyatt Regency Aurora in Aurora, Colorado, November 5-10. This unique, immersive event allows you to experience real financial planning scenarios, build relationships with mentors, and learn to listen and support clients. Either apply for a scholarship or register to attend this transformative event.

FPA and Latino Leadership Institute to Bring *Inclusive Leadership Training* to Members

The country's rapidly changing demographics have many organizations and leaders asking themselves what exactly they need to do to attract the next generation of talent and serve the next generation of clients. In response, FPA and the Latino Leadership Institute (LLI) are partnering to bring the Insight to *Inclusive Leadership Badge Program* to FPA members. The program's six virtual 90-minute modules are rooted in neuroscience and self-awareness, and its cohort format allows for deep connections between participants. Learn more.

Get Your Conference Fix This Fall with One of the Many FPA Chapter Programs

While FPA works to make much of the educational sessions that were going to be held at FPA Annual Conference available on-demand, all members are encouraged to check out this list of conferences and symposia taking place this fall by many of our outstanding local chapters. And with many of the programs taking place virtually, you have the opportunity to register for a program that isn't in your backyard! Check out the chapter conferences and symposia taking place!

Take 5

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.

The All-New FPA Marketplace: Savings on the Products and Services You Need

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

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.

CHAPTER PLATINUM PARTNERS

American Century Investments®

LearningQuest®
529 Education Savings Program

Greater Kansas City Community Foundation℠

FAIRWAY®
INDEPENDENT MORTGAGE CORPORATION
NMLS#2289

Reverse Mortgage Planner

THE TIFIN GROUP

CHAPTER PARTNERS

GOLD PARTNERS

First Trust

THE ROBERT E. millergroup

OSTERWEIS
CAPITAL MANAGEMENT

SILVER PARTNERS

Ash Brokerage

Capital Group/American Funds

CarePatrol

Cavanal Hill

UMB

BRONZE PARTNERS

BlueRock Capital Markets

Waddell & Reed

CALENDAR OF EVENTS

October 7, 2021
5:00-6:30 p.m.
NexGen Happy Hour
Brew Lab, Overland Park

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://www.financialplanningassociation.org/fpa-greater-kansas-city-events

Volunteer Opportunity

Can you help? The KC Metro Tax Coalition and MU Extension are seeking volunteers. We prepare free tax returns for people with low income through the IRS Volunteer Income Tax Assistance (VITA) and Tax Counseling for the Elderly (TCE) programs. We also offer financial education and asset building to help taxpayers invest in their future. Please consider giving your time and expertise. It can be very rewarding - people in the community genuinely appreciate the assistance they receive through the program. The IRS offers continuing education credits to qualifying participants.

Send questions to kcvita@missouri.edu or register online at: https://extension.missouri.edu/counties/urban-west-region/tax-prep/.