The Newsletter of FPA of Greater Kansas City

News&Views

October 2021

FINANCIAL PLANNING ASSOCIATION

GREATER KANSAS CITY

IN THIS ISSUE:

FPA of Greater Kansas City

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www.fpakc.org

WELCOME NEW MEMBERS

David Lammert
Chris Lilley

CAREER LISTINGS

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

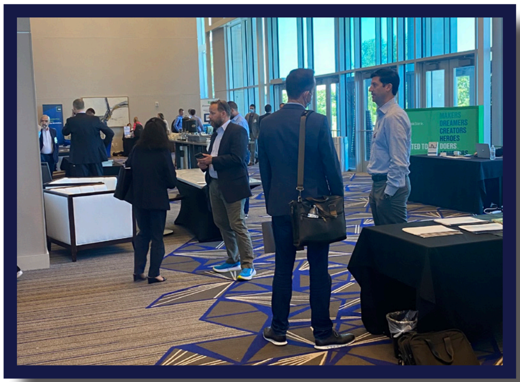
FIRST ANNUAL SYMPOSIUM A SUCCESS

by Ben Skilling, CFP®, Director of Programs

What a day it was! Between all the networking, continuing education and fun, the inaugural Greater Kansas City FPA Symposium was a huge success! It was great to reconnect with so many of our members face-to-face, as it had been way too long. For those that attended, we hope you found the day to be a good investment. For those that couldn't make it, here is a quick recap of the many highlights:

- Michael Kitces sharing his insights into the "Five Industry Trends Reshaping Financial Advice" along with his research on "What Makes Financial Planning More Efficient."
- Having a chance to hear from so many subject matter experts on a multitude of relevant financial planning topics during the breakout sessions. Topics ranged from maximizing retirement income, business valuation and deal structuring, understanding the semi-transparent active ETF marketplace, fear and loathing within fixed income, bridging the intergenerational communication gap within families, Regulation Best Interest, understanding client risk capacity and of course, preparing for a changing tax environment. Did I forget to mention these sessions all qualified for CE?
- Having the chance to network, eat and drink with our great sponsors, members and guests within the exhibit hall

What a day it was! With that said, we need to thank the many volunteers and Board Members that worked tirelessly to string this event together, and most importantly, let's recognize the great sponsors and partners that generously contributed towards making this event a success.



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Osterweis Capital Management

Please save the date for next year's Greater Kansas City FPA Symposium which will be held on August 31, 2022 at the Embassy Suites. We look forward to seeing you there!

If you are interested in being a sponsor at next year's symposium, please reach out to:
Jacob Watts, CFP®
2022 Partnership Chair
jacob.watts@legacykc.com
(785) 423-1386

Ben Skilling, CFP®
FPAGKC 2021 Director of Programs
Symposium Chair

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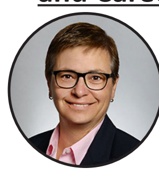

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FPA of Greater Kansas City

NOVEMBER CHAPTER MEETING

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

Amy Florian, CEO of Corgenius, combines the best of neuroscience and psychology with a good dose of humor in training professionals to build strong relationships with clients through all the losses and transitions of life.

This session introduces different behavioral financial approaches and how they can be applied to improve clients' quality of life and sense of well-being through the financial planning process. A framework for understanding client well-being and success will be provided, and specific tools and resources that are applicable to financial planning will be discussed.

Registration Fees:

Includes one hour of CE and reception following.

Members $29

Non Members $99

Continuing Education:

One hour is approved for all of the following designations:

CFP®

CDFA

IWI

American College

College of Financial Planning

Additional information and registration!

FINANCIAL PLANNING ASSOCIATION

Take 5

An update on the programs and services exclusively for valued FPA members

October 2021

Exciting Learning Program Coming This Fall for FPA Members – at No Cost!

Just because we had to cancel the FPA Annual Conference doesn't mean we need to let all the great educational content that was going to be available go to waste! We are excited to announce that much of that content will be available to all FPA members – at no cost – during our FPA Fall Learning Series! For four weeks beginning November 8, we are going to roll out live and on-demand learning sessions around four content areas relevant to the practice of financial planning. Interactive discussions will be held through FPA Knowledge Circles and ample CFP® CE will be available. Registration for the live events is now open, so register today!

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!

FPA Launches New Community to Support Neurodivergent Financial Planners, Expand Diversity

To welcome and support the learning and thinking differences of neurodiverse financial planners, FPA is pleased to announce the launch of a new community specifically for neurodivergent financial planners. The FPA Neurodivergent Planner Knowledge Circle will provide a community for neurodiverse planners, those hiring or supervising neurodiverse individuals, and those serving neurodiverse individuals to share resources, insights, and best practices. Learn more about this wonderful new community.

Take 5

NARSSA and FPA Partner to Help Members Enhance Their Social Security Knowledge

The National Association of Registered Social Security Analysts (NARSSA), the leader in expert Social Security education, training, and analysis fulfillment for financial professionals, has announced a new partnership with FPA. NARSSA and FPA will work on several initiatives to help educate FPA members on Social Security, including access to the RSSA course. The collaboration will also include Social Security insights and education delivered through webinars, workshops, contributed articles to FPA's *Journal of Financial Planning*, blogs, and more. Learn more.

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!

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

FPA members save 15% off eligible 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.

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CALENDAR OF EVENTS

November 2, 2021
8:30-10:00 a.m.
Retirement Planning: Senior Living Options and Associated Costs
Presented by:CarePatrol
Bridge Space, Lee's Summit, MO

November 4, 2021
7:30-9:00 a.m.
NexGen Roundtable
Aspyre Wealth Partners, Overland Park

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

January 19, 2022
11:30-2:00 p.m.
January Chapter Meeting
Embassy Suites, Olathe
Biden Tax Plan and Estate Planning
Jeffrey Levine, CPA/PFS, CFP®, AIF, CWS®, MSA

For a full list of events and registration
please visit our website at
https://www.financialplanningassociation.org/fpa-greater-kansas-city-events