



## President's Message – February 2022

The start of the New Year has certainly kept us on all our toes with respect to rising bond yields, stubbornly persistent inflationary pressures and more stock market volatility than most care to see. The final full week of January finally registered gains for the broader indices. Perhaps this is a harbinger of brighter days ahead.

Just as exciting as the roller coaster ride in the stock market lately was this year's Winter Symposium, which was held on January 24<sup>th</sup> at the Westin Tyson's Hotel. This was the first of many in-person events in 2022, and by all accounts it was a success with 125 people in attendance!

While our attendance was below pre-COVID levels, I believe our color-coded name tag system (see below) created an environment where attendees could interact and network in person in the way they were most comfortable. I enjoyed seeing many of you in person for the first time in quite a while, and I know that our sponsors especially enjoyed the opportunity to reconnect with our members on an individual basis.

I'd like to thank our members for a great turnout, and I'd like to thank our sponsors for their continued support of the Chapter in 2022. Our sponsors are just as passionate about our profession as we are, and they are eager to support us and help us as we guide our clients to successful outcomes.

I'd also like thank past President Parker Trasborg for bringing together a strong line up of speakers who educated our members on wide range of timely topics. The keynote speaker of the day was Dr. David Kelly, who shared with us his outlook on the interest rates, inflation and financial markets.

As if a great line-up of speakers wasn't enough, we also handed out our Outstanding Member Awards for 2022. We created a new Award this year to honor Peggy Nelson and her contributions to the Chapter over the past 24 years. Congratulations to this year's Award winners!

- |                                                 |                             |
|-------------------------------------------------|-----------------------------|
| - <i>Peggy Nelson Outstanding Service Award</i> | Peggy Nelson                |
| - <i>Lifetime Achievement Award</i>             | Bruce D. Vaughn, CFP®, AIF® |
| - <i>Norma Severns Leadership Award</i>         | Parker G. Trasborg, CFP®    |
| - <i>Planner of the Year Award</i>              | Daniel Lash, CFP®, AIF®     |
| - <i>Emerging Leader Award</i>                  | Aaron W. Clarke, CFP®, AIF® |

Finally, and as many of you know, none of our events would be possible without the tireless effort and stewardship of our Executive Staff. A special "Thank You" to outgoing Executive Director Peggy Nelson and to our incoming Executive Director Kristin Beane for bringing our members and sponsors together for a fantastic Symposium.

## Upcoming Events:

---

We have two exciting luncheons planned in for the remainder of the quarter.

Our **February** luncheon will be held Thursday, **February 17<sup>th</sup>** at Westwood Country Club in Vienna, Virginia. These presentations have been approved for two (2) hours of CFP and CIMA CE Credits

- **Gary Altman** of Frost Law, presents “*Estate Planning for Crypto Currency, C Corporation Stock and State Income Taxes*”. Click [here](#) to learn more about Gary.
- **Jamie Catherwood** of O’Shaughnessy Asset Management and Author of Investor Amnesia presents “*Stuck on Repeat*”. Click [here](#) to learn more about Jamie.

Our **March** luncheon will be held Friday, March 25<sup>th</sup> at Westwood Country Club in Vienna, Virginia.

- Chris Yost, SVP of Cantor Fitzgerald presents “*Advanced Planning Strategies with Opportunity Zones and 1031’s*”. Click [here](#) to learn more about Chris.
- Chad Morgan, CFA and Rick Rath of Invesco. Details forthcoming.

If you’ve not done so already, you can register for these events [here](#).

## New Website:

---

Please note our new website address and bookmark the new URL in your browser:

<https://www.financialplanningassociation.org/chapter/fpa-national-capital-area>

## Color-Coded System for In-Person Events::

---

For all IN PERSON events, we will utilize a color-coded system that allows attendees to identify their comfort level with respect to social distancing in person

A **RED** dot on your name tag will indicate a preference for “no contact”, a **YELLOW** dot will indicate a preference for “elbows only” and a **GREEN** dot will indicate a preference for “handshakes only”. Please refer to the graphic below.

## Volunteer Opportunities:

---

Your Chapter needs you! Please consider getting volunteering your time to help make our Chapter the best it can be. This is a great way to learn more about the Board positions and meet more members. The following committee opportunities are available:

- Membership
- Social & Golf
- Pro-bono

If interested, please email Kristin Beane at [kristin@fpanca.org](mailto:kristin@fpanca.org) and she will connect you with the committee Chair.

### **FPA NCA NexGen:**

---

Check the website for dates and updates.

### **FPA Media Mastery – Quarterly Media Training Program:**

---

#### **Media Mastery: All-Member Quarterly Virtual Media Training**

One of the most impactful ways you can elevate your brand awareness is by working with journalists and being featured in their content. But how do you do it effectively? As an FPA member, you can learn the ins and outs of working with journalists with the Media Mastery program. Each quarter, Ben Lewis – FPA’s Chief Communications Officer – walks members through the “Four P’s” of working with the media: Prepare, Perform, Poise, and Protect. Plus, any CFP® professional member who attends will qualify to participate in FPA MediaSource, the automated media query system that has connected members with hundreds of journalists!

Register for this Media Training program [here](#).

### **Diversity & Inclusion:**

---

There are some exciting opportunities if you are looking to learn more or get involved. FPA National has an extensive list of Knowledge Circles and opportunities to help you discuss, engage, and learn with fellow FPA members.

**Circles:** These knowledge circles can be joined [here](#)

### **FPA National Updates:**

---

The Annual Retreat will be in-person on April 25-28, 2022 in Lost Pine, TX. You can click here to learn more and Register [FPA Annual Retreat](#). You can view the complete list of 2022 events [here](#).

### **FPA Knowledge Circles:**

---

#### **Women & Finance Knowledge Circle:**

*Goals, Accountability, and the Art of Saying No.*

*Business Development Planning Metrics You Need for Growth.*

Lisa Callahan, Founder of Transformation for Real.

February 10<sup>th</sup> at 12:00 pm (MST)

Personal and professional goals are top of mind at the beginning of each year and in many ways, those goals are a form of self-care. But the question sometimes quickly becomes - How do I do it all? Given the daily responsibilities we all face with work, family, friends, etc., it is easy to forget to allocate time for self-care. Lisa Callahan, a Transformational Life Coach and founder of Transformation for Real will guide us through a series of discussions and exercises that give us additional confidence in making our goals happen while truly understanding the meaning of self-care.

Lisa will give us some tools to make sustainable, long-term changes and teach us strategies to reframe our thinking and empower our progress while helping us explore tactics that allow us to find what can be nourished in our lives, and rediscover how to take care of ourselves too!

**For Firm Leaders:**

*Key Business Development Planning Metrics You Need for Growth*

Amy Franko, Founder and CEO of Franko Associates.

March 3<sup>rd</sup> at 12:00 pm (MST)

Amy Franko of Firm leaders, where you place your focus has a direct impact on your team's success and overall firm growth. This is why your business development planning metrics are critical to your growth strategy. In my work with professional services clients, I see varying degrees of maturity when it comes to business development metrics and overall accountability in driving client growth.

Check out other Knowledge Circles [here](#).

In closing, I'd like to thank our members, our sponsors and Board members once again for their respective contributions to our outstanding Chapter.

I look forward to seeing you all at our upcoming events.

Respectfully,

*Kirk*

W. Kirk Taylor, CFP®  
Kirk Capital Advisors, LLC  
2022 President of FPA NCA  
kirk@kirkcapitaladvisors.com

