



## **President's Message – January 2022**

Welcome fellow FPA NCA members to 2022!

We enter the New Year optimistic that life will soon get back to normal but acknowledge that the so-called New Normal may be with us longer than we may like. Nonetheless, this year's Board is committed to making your 2022-member experience as "pre-COVID like" as we can, as we discuss below.

Before I get ahead of myself, let me be first to give a big "Thank You" to Rose Price for her outstanding leadership as Chapter President in 2021. Rose diligently and successfully navigated the ups and downs of the pandemic to ensure that our members and sponsors had ample opportunities to engage with one another whether virtual and/or in person. It's been an honor to serve on the board with Rose for the last six years. Thank you Rose for your service!

Of course, none of Rose's efforts and vision could have come to fruition without the steady hand and guidance of our Executive Director, Peggy Nelson. As you may know, after 24 years of dedicated service to our Chapter, Peggy will retire at the end of January. Her knowledge of the inner workings of the Chapter, including its members, sponsors and FPA National has been invaluable to the Chapter growth and success. To say that Peggy was the glue that kept our Chapter together is nothing short of an understatement.

It's bittersweet for me as the Chapter President to see Peggy ride off into the sunset. Her contributions will be sorely missed, but at the same time we are excited to welcome Kristin Beane of Endeavor as our new Executive Director. I've had the privilege of working with Kristin as part of my involvement in Alliance Forum and the Chapter Leadership Conference in years past and know firsthand that she's extremely qualified and capable of picking up where Peggy leaves off. She's served as the Executive Director of Massachusetts for over 20 years and is a high caliber professional who also brings intimate knowledge of FPA and Chapter management to our Association.

Please join me in thanking Peggy for her 24 years of service and in welcoming Kristin and her Endeavor team to FPA NCA!

Please note that our new website is up and running. Here is the new URL:  
<https://www.financialplanningassociation.org/chapter/fpa-national-capital-area>

## Upcoming Events:

---

Our first event of the year will be our VIRTUAL Ethics session which will be held from 2:30-5:00 on January 13<sup>th</sup>.

I am pleased to announce that our annual Winter Symposium will be held IN PERSON January 24<sup>th</sup>, 2022 at a new location, the Westin Tysons Hotel. Our 2020 President, Parker Trasborg has put together a great program with 8 CFP and CIMA Continuing Education (CE) approved credits. You can view our speaker line-up and agenda by going [here](#).

As was the case for our December luncheon, we will once again embrace a color-coded dot system at all IN PERSON events 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.

This system was well received at our December luncheon and we expect to continue using this system at our IN PERSON events in 2022.

At the January Symposium, we will recognize Peggy for her 24 years of outstanding work with the Association and welcome Kristin Beane, our new Executive Director. Additionally, we will have our Outstanding Member Award Presentation, so please join us on the 24<sup>th</sup>!

Finally, our February luncheon will be held February 17<sup>th</sup> at Westwood Country Club in Vienna, Virginia. Gary Altman, a longtime sponsor of our Chapter will discuss Estate Planning for Crypto Currency, C Corporation Stock and State Income Taxes. If you’ve not done so already, you can register for the events at: <https://www.financialplanningassociation.org/chapter/fpa-national-capital-area>

## Volunteer Opportunities:

---

If you are considering getting more involved, we announced committee opportunities at our Annual Membership Meeting in December. 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 Peggy and she will connect you with the committee Chair.

## Next Generation:

---

Check the website for dates and updates. Our NexGen Forum Discussions will be announced soon!

### **Diversity & Inclusion:**

---

There are some exciting opportunities if you are looking to learn more or get involved. FPA National will be planning 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 for the [FPA Annual Retreat](#). You can view the complete list of activities for the Retreat at the above link.

### **FPA Knowledge Circles:**

---

Check out the Knowledge Circles below and more at <https://fpalearning.onefpa.org/knowledge-circles>

#### **Business Success Knowledge Circle: Make Your Brand Work as Hard as You Do! January 11, 2022**

Guest speaker Mamie Patton will be presenting, “Make Your Brand Work as Hard as You Do!”

#### **Women & Finance Knowledge Circle: Future of the Women & Finance KC Community. January 13, 2022**

This call will be led by new Knowledge Circles hosts Michelle Fait, Bridget Grimes and Gretchen Halpin to discuss their vision for the future of the Women & Finance Knowledge Circle as well as to hear from you about what you would like to see for future topics and presentations.

In closing, and along with the support of our 2022 Board, I am looking forward to leading FPA NCA to another successful year. I look forward to seeing you virtually and in person in the coming months.

Best wishes for a prosperous 2022!

*Kirk*

W. Kirk Taylor, CFP®

2022 President of FPA NCA

[kirk@kirkcapitaladvisors.com](mailto:kirk@kirkcapitaladvisors.com)



**NO CONTACT**

6 FEET APART  
NO EXCEPTIONS

**ELBOWS ONLY**

STILL BEING CAUTIOUS

**HANDSHAKES OKAY**

FREQUENT HANDWASHING