The Newsletter of FPA of Greater Kansas City

News&Views

April 2023

FINANCIAL
PLANNING
ASSOCIATION

GREATER
KANSAS CITY

IN THIS ISSUE:

WELCOME NEW MEMBERS

Samuel Harrison
Scott Leak, CFP®
Adam Maddox
Scott McGehee, CFP®
Dylan Stiegemeyer, CFP®
Cristina Wiebelt-Smith

2023 SYMPOSIUM SPONSOR/EXHIBIT AVAILABLE

FINANCIAL PLANNING ASSOCIATION
GREATER KANSAS CITY

2023 FPA of Greater Kansas City Symposium

August 29, 2023
Embassy Suites Olathe

SPONSOR AND EXHIBIT OPPORTUNITIES

The FPA of Greater Kansas City Third Annual Symposium will take place in-person on August 29, 2023 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. Our goal is to give you an excellent opportunity to develop profitable relationships with FPA members and other financial professionals through this event. We anticipate approximately 200 attendees.

Symposium Sponsor $1,500 *(included with Chapter Platinum Partnership Package)*

- Symposium Sponsors receive all of the benefits of workshop sponsors and exhibitors as listed below (only one attendee).

Workshop Sponsor $1,250*

- One 50 minutes educational session. **You must include a detailed description of the session including speaker bio and timed outline by July 1.** The FPAGKC Board will approve all content prior and it must qualify for CFP CE.
- One symposium registration.
- Listing in the FPA of Greater Kansas City chapter newsletter as a Symposium Sponsor.
- Promotion and logo placement on the FPA of Greater Kansas City website (www.fpakc.org).
- Logo in the conference program, materials, and signage.

**Gold Chapter Partners receive a discounted Workshop Sponsorship at $750*

Exhibit Booth $750 *(included with Chapter Gold Partnership Package)*

To maximize your exposure to attendees, booths will be arranged outside the main meeting room where all breaks and the reception will be held. This arrangement will allow conversations to be held throughout the day during various breaks.

- One 6' table with two chairs, exhibitors may bring in displays as long as it fits around or inside their booth space. Basic power outlets will be accessible, however, we encourage you to bring your own extension cords since your booth may not be directly next to an outlet.
- One booth attendee. Additional registrations can be purchased.
- Listing in the FPA of Greater Kansas City chapter newsletter as a Symposium Exhibitor.
- Promotion and logo placement on the FPA of Greater Kansas City website (www.fpakc.org).
- Logo in the conference program, materials, and signage.

Questions? Please contact Brandy Johnson, Chapter Executive, bjohnson@onefpa.org or Will Bohne, Programs Chair, will@embarkfp.com.

Please check our website at www.fpakc.org for the latest updates and information. You will also receive detailed emails from FPA regarding event details, reminders, booth assignments, set up times, etc.

MAY CHAPTER MEETING & RECEPTION

May 10, 2023

2:15 - 5:00 p.m.

Embassy Suites Olathe

ESTATE PLAN ISSUE SPOTTING FOR FINANCIAL ADVISORS

Justin Whitney, JD, LLM Tax, CPA

The presentation will discuss tax and non-tax issues that financial advisors should keep top of mind when discuss estate planning with their clients. These include an overview of considerations present applicable to revocable and irrevocable trusts, estate tax, income tax, GST tax, family circumstances, and asset protection. Noteworthy code sections, regulations and case law will be addressed along with practical considerations. Advanced topics such as dynasty trusts, grantor retained annuity trusts, life insurance trusts and family limited partnerships will also be explained.

HOSTING FAMILY SUMMITS THAT ENGAGE THE NEXT GENERATION

Tammy Breitenbach

If advisors want to help clients pass wealth and values to the next generation, they have to engage effectively with the next generation. If they want to make their firm sustainable and keep clients, they need to do the same. Many advisors are struggling to engage the next generation and keep the family wealth – and the plan – with their firms. One solution is to adopt Family Summit Meetings (or Family Planning Meetings) as a valuable strategy for creating engaging and meaningful multi-generational planning.

This presentation will cover how to plan and deliver a successful Family Summit for clients to share their wishes and integrate the Family Summit meeting as a valuable service in their practices.

Two hours CFP and Kansas Insurance Approved

ADDITIONAL INFORMATION AND REGISTRATION

FINANCIAL PLANNING ASSOCIATION

Take 5

An update on the programs and services that make FPA *your partner in planning*.

APRIL 2023

There's Still Time To Register For FPA Retreat 2023!

FPA Retreat 2023 is not your average financial planning event. It's an immersive experience designed to ignite your creativity, challenge your thinking, and connect you with a tribe of like-minded professionals. But it's not all work and no play at the FPA Retreat 2023. You'll also get to indulge in some seriously fun activities like the "Dining in the Dark" experience and Goofy Golf. Get ready to laugh, unwind, and let your hair down with your fellow planners. So what are you waiting for? Register for FPA Retreat 2023 and get ready for a one-of-a-kind experience that will leave you feeling inspired, empowered, and energized!

Take Your Voice to The Hill During FPA Advocacy Day 2023!

Play a role in educating federal lawmakers on the importance of financial planning and your critical role as a financial planner. Join us in Washington, D.C., June 13-14 for FPA Advocacy Day 2023! FPA Advocacy Day is an important opportunity for FPA members to continue the dialogue with federal policymakers about the financial planning profession while displaying FPA's strength as the largest membership association for CFP® professionals. Plan for a high-energy, invigorating day that will empower you to interact positively with policymakers to help advocate for issues crucial to you, your business, and your clients. Registration closes on May 15, so register today!

FPA Announces Substantial Impact By FPA Chapters and Members in 2022

FPA was pleased to announce that the number of consumers attending financial literacy workshops held by FPA chapters and members in 2022 increased by an impressive 212% from the previous year. This is a significant achievement for the Association's chapters and members that are dedicated to promoting financial literacy and education in communities across the country. Among the FPA chapters reporting financial literacy and pro bono financial planning programming in 2022, 230 workshops were held, attracting 17,302 consumers—up from 5,546 attendees the previous year. FPA chapters and members also reported providing 4,424 consumers with 11,506 hours of pro bono financial planning services by 962 individual FPA members throughout the year.

Read the CEO Quarterly Update To Learn About FPA's Activities in Q1 of 2023

To keep FPA Members and volunteer leaders apprised of what the Association is doing to make FPA a better organization, FPA CEO Patrick D. Mahoney provides a quarterly CEO Update for Q1 of 2023. In the latest installment, Patrick shares an update on some of the ways the Association is working to support members, including the new JFP Research Quarterly, FPA Advocacy Day, the new Elder Planning Specialist Program, and more.

FPA

Take 5

APRIL 2023

Share Your Thoughts on Title Protection for Financial Planners

The legal recognition of the term "financial planner" through title protection is FPA's long-term advocacy objective. We will be working over the next couple of years to define our strategies and identify the threshold standards for competency and ethics that anyone proclaiming to be a financial planner should meet. As an FPA Member, we need you to share your thoughts and opinions. FPA leaders are holding a series of virtual town halls so you can share your questions and ideas that will help shape the potential threshold standards and strategies the Association may employ in pursuit of this lofty goal. Register for a town hall now!

The April *Journal of Financial Planning* Now Available

FPA members can now read the April issue of the *Journal of Financial Planning* to learn how to remedy potential conflicts of interest, how to audit your processes, the effect of prenuptial agreements on estate planning, the role of financial education on the economy, how to lead an ethical culture, maximizing testimonials in your marketing, and much more. Access the latest issue of the *Journal* now.

Nominate a Deserving Financial Planner for FPA's Top Award

FPA is seeking nominations for the P. Kemp Fain, Jr., Award — the pinnacle of recognition of an exceptional individual who has made outstanding contributions to the financial planning profession. The award honors Fain who was a pioneer in the financial planning profession, blazing trails in professional associations, the CFP® certification, and the profession at-large. Nominations are due April 21. Nominate someone today!

Kitces Marketing Summit: Common Advisor Marketing Done Uncommonly Well

Take part in the Kitces Marketing Summit where you'll have a chance to see what common advisor marketing tactics look like when they are done uncommonly well with unique behind-the-scenes looks at real strategies that attract clients. Taking place virtually April 27 from 12:00 to 4:00 p.m. ET, the Summit will be your place to learn what other professionals are doing to market and grow their business. As a special bonus, FPA members can save $50 on the purchase of a General Pass by using the discount coupon code: FPAKitces. Register today!

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American Century Investments®

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axos® ADVISOR SERVICES

Greater Kansas City Community Foundation℠

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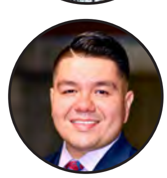

Eric Martinez, CFP®, MBA, CRPC®
American Century

CALENDAR OF EVENTS

May 1, 2023
Chapter Golf Tournament
Canyon Farms Golf Club

May 4, 2023
NexGen Happy Hour
Kansas City, MO

May 5-6, 2023
NexGen Mini Gathering
Kansas City, MO

May 10, 2023
Chapter Meeting
Embassy Suites, Olathe

August 29, 2023
SYMPOSIUM
Embassy Suites, Olathe

September 20, 2023
Chapter Meeting
Embassy Suites, Olathe

October 18, 2023
Chapter Meeting
Embassy Suites, Olathe

November 15, 2023
Chapter Meeting
Embassy Suites, Olathe

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

CAREER LISTINGS

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