

The Newsletter of FPA of Greater Kansas City

# News & Views

November 2021



*Happy  
Thanksgiving*

**FPA**

**FINANCIAL  
PLANNING  
ASSOCIATION**

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**GREATER  
KANSAS CITY**

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## FPA of Greater Kansas City

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

## WELCOME NEW MEMBERS

Leah Mueller  
Sara Wilkerson

## CAREER LISTINGS

Visit the FPA of Greater Kansas City [Careers Page](#)  
for a full list of available positions.

# MESSAGE FROM THE PRESIDENT

by Tyler Landes, CFP®, AIF®

As we reach the end of 2021, I feel very proud of the work our members have done over the past 12 months. We are lucky enough to work in what I consider a helping profession, and there have been many opportunities to help our clients and communities throughout the challenges of the past couple years.

When I was a student in the Financial Planning program at Mizzou, I recall a professor detailing the difference between simply maximizing wealth and maximizing the utility of that wealth for a family. As financial planners, we sit at the table (or Zoom screen) and guide conversations that lead families to organize their own thoughts and feelings around what is important to them. Then we help them to imagine what's possible and to take action.

For some I know, these ultimate goals and aspirations have shifted, been clarified, or been confirmed in different ways over the past two years. To say the least, there has been ample time for reflection, and we see some indications of these shifts in the ways we choose to return to work, in housing prices, and even in expected birth rates. To be in the trusted position to help our clients sort through their possible outcomes, to choose a path forward, and to organize their resources to get there, is a major responsibility. It's also why I love what we do.

To me, FPA of Greater Kansas City is a place where we come together to help each other be better professionals, more skilled planners, and ultimately to be more helpful to our clients. In 2015 I started my own practice which was as exciting as it was isolating. Having connected with other FPA members through committee service, our NexGen group, and ultimately serving on our Board, provided me with the community support I needed to continue growing as a planner and serving my clients well.

So, as I think back over this past year as President of our Chapter, and also what came before, it's a bit of a full-circle feeling. I think about the members I met at our Career Day when I was a student at Mizzou who invited me to attend a meeting when I moved home. I think about the members that I met in my mid-20s at our NexGen happy hours who are now leaders and principals in their firms. I think about the more experienced planners I've sat with and learned from at many lunch meetings over the years. And I think about the friendships I've formed volunteering on various committees and through my time on the Board.

In all of these ways, I am thankful for our Chapter and the impact it has made on me. We have several hundred members here in Kansas City, and if some portion has had a similarly positive experience, then we are doing something right. And if even just those members go back and make a greater difference in the lives of their clients, then we might be doing something important.

As we move into 2022, I will serve as our Chapters' representative to the OneFPA Advisory Council with the national FPA. If you have ideas on how to improve FPA, please share those with me or one of our Board members. And if you are so inclined, consider serving on a committee and joining the many volunteer leaders who help to make our Chapter one of the best. I'm very glad that I did.

**Tyler Landes, CFP®, AIF®**  
FPAGKC 2021 President



# 2021 BOARD OF DIRECTORS



## **Chair of the Board**

Mark Albright, CFP®, CRPC®  
Caliber Wealth Management



## **President**

Tyler Landes, CFP®, AIF®  
Tandem Financial Guidance, LLC



## **President Elect**

Carrie Ohm, CPFA  
Resources Investment Advisors



## **Secretary/Treasurer**

Todd C. Ericson, CFP®  
Stepp & Rothwell, Inc.



## **Director of Communications**

Jack Giardino, CFP®  
Mariner Wealth Advisors



## **Director of Community Outreach**

Allison Cooley, CFP®  
Mana Financial Life Design



## **Director of Government Relations**

Cole K. Foster, CFP®



## **Director of Membership**

Jason Newcomer, CFP®  
Barber Financial Group



## **Director of NexGen**

Landon Warmund, CSLP®  
Reliant Financial Services



## **Director of Partnerships**

Jeffrey Hrabe, CMFC®  
Cavanal Hill Distributors Inc.



## **Director of Programs**

Ben Skilling, CFP®  
UMB



## **Director of Public Awareness**

Jamie A. Bosse, CFP®, RFC  
Aspyre Wealth Partners

## **Directors of Student Mentoring and Career Development**



Mary Dorn, MBA  
University of Missouri



Derek Lawson, Ph.D., CFP®  
Kansas State University

## **Directors at Large**



Jennifer Price, CFP®  
Creative Planning, Inc.



Michael Diederich, CFP®  
UMB



Angela Robinson, CFP®, ChFC, CRPC,  
CLF, CRPS, APMA, BFA  
Robinson Wealth Advisors



## **Chapter Executive**

Brandy Johnson, CAE  
FPA of Greater Kansas City

# JANUARY CHAPTER MEETING

**JANUARY 19, 2022**

11:30 a.m. - 2:00 pm

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

**Jeffrey Levine**

## ***THE BIDEN TAX PLAN: PROPOSED CHANGES AND PLANNING OPPORTUNITIES***

2020 was an unusual year, to say the least. And as if normal year-end planning, combined with the complexities brought about by a pandemic weren't enough to deal with on their own, 2020 offered an additional complication....a Presidential election! President Joe Biden has detailed a few substantial changes to the tax code, the focus primarily on individual income tax and investment tax. In this session, attendees will learn about each of the major changes proposed by President Biden, exploring both the new challenges, and planning opportunities, it creates.

## ***ESTATE PLANNING FOR INCOME TAXES: MAXIMIZING STEP-UP IN BASIS FOR COUPLES***

Given recent changes in the law, "tax planning" for one's estate at death has become a lot less about estate tax planning, and far more about the income tax planning opportunities at death... particularly with respect to maximizing available step-up in basis opportunities. With that in mind, attendees of this session will explore topics including how pre-death asset transfers can help maximize step-up in basis, how other types of pre-death transfers can help avoid the potential for a step-down in basis, complications associated with these strategies for clients living in community property states, and the disadvantages of traditional credit shelter trusts that emerge in an estate planning environment driven by income- (rather than estate-)tax planning.



Jeffrey Levine is the Lead Financial Planning Nerd for Kitces.com, and is also the President of Fully Vested Advice, Inc., which provides financial education and consulting services to industry professionals.

Jeffrey is also the Chief Planning Officer at Buckingham Wealth Partners and works closely with their team to create a seamless client experience that makes it easy to plan and instill confidence as they work towards their most important goals. He serves as a technical resource for advisors and the firm's primary thought leader regarding evidence-based planning concepts and strategies. Buckingham allows him to train and educate hundreds of advisors and support them in their pursuit of helping clients fulfill their financial dreams.

He is a nationally-recognized and award-winning thought leader within the financial planning community.

### ***Registration Fees:***

Includes two hour of CE and lunch.

Members \$29

Non Members \$99

**[Additional information and registration!](#)**

# Take 5

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



**November 2021**

## **The FPA Fall Learning Series is Underway – and It's No Cost for Members!**

The FPA Fall Learning Series is officially underway, and this is your opportunity as an FPA member to gain a ton of insight into tax and estate planning. There are a multitude of relevant learning programs, live discussions, and a ton of CFP® CE credits available. And, best of all, there is no cost for FPA members to participate! [Check out all this exciting program has to offer you!](#)

## **FPA and SoFi Partner to Provide Exclusive Access to Suite of Financial Solutions**

SoFi, a leading next-generation financial services platform, and FPA announced the launch of a strategic partnership between the two organizations designed to benefit FPA's financial planner members and the clients they serve. The partnership provides FPA members – and their clients! – with preferred rates and exclusive access to a suite of financial solutions, services, and educational resources, including Student Loan Refinancing and Private Student Loans. [Learn about this new member benefit today in the FPA Marketplace.](#)

## **The November Journal of Financial Planning is Now Available**

FPA members can now read the November issue of the *Journal of Financial Planning*, powered by Allianz, to learn more about the pressures that have led to the racial wealth gap and how planners can help close it, what neurodivergent clients need from financial relationships, and how your own unexamined biases can impact your planning. [Access the latest issue of the Journal now.](#)

## **The Kitces Financial Planning Value Summit: Special Offer for FPA Members!**

As more advisers adopt a fee-for-service approach of charging outright for financial planning, the need to "prove" their financial planning value to prospects and clients becomes increasingly more important. Attend the Kitces Financial Planning Value Summit on Dec. 8 where you'll get a behind-the-scenes look at the actual strategies and deliverables that successful advisers have developed to stand out and communicate their value to prospects and clients. *FPA members receive \$50 off with discount code KitcesSummitFPA.* [Register today!](#)

### 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.](#)

### Discover BHG—Exclusive Financing Partner of FPA

FPA has partnered with BHG to provide our members with easy access to a full suite of fast, hassle-free financial solutions, including business, consumer, and SBA 7(a) loans, as well as credit cards. BHG offers large amounts and extended repayment terms, which can help you make a significant impact on your finances fast—while keeping your monthly payment affordably low. [Want to learn more? Discover BHG.](#)

### Financial Advisers Needed for Research Study on Long-Term Care Insurance

Researchers from the National Association of Insurance Commissioners' [Center for Insurance Policy and Research](#), the [University of Georgia](#), and [California Health Advocates](#) are recruiting financial advisers who have worked with long-term care insurance (LTCI) policyholders. The purpose of this project is to add to our understanding of consumer knowledge and attitudes about LTCI, especially those who have received premium increase notices. Volunteers will participate in one-hour virtual interviews in November or December 2021 with a \$125 honorarium. [To indicate your interest in the project, please click here.](#)

## Take 5 is Brought to You by Ryan Insurance Strategy Consultants

Since 2009, FPA has partnered with Ryan Insurance Strategy Consultants to offer FPA members an industry-leading Long Term Disability plan, and recently launched a group voluntary Term Life plan. They also consult with advisory firms in making insurance product recommendations and their network of advisers are available to help solve more complicated insurance planning issues. Learn more at [associationinsurancebenefits.com](http://associationinsurancebenefits.com).



# CHAPTER PLATINUM PARTNERS



American Century  
Investments®

LearningQuest®  
529 Education Savings Program



GREATER KANSAS CITY  
COMMUNITY FOUNDATION<sup>SM</sup>



**FAIRWAY**®

INDEPENDENT MORTGAGE CORPORATION

NMLS#2289



THE  
TIFIN  
GROUP

# CHAPTER PARTNERS

## GOLD PARTNERS



## SILVER PARTNERS

**Ash Brokerage**

**Capital Group/American Funds**

**CarePatrol**

**Cavanal Hill**

**UMB**

## BRONZE PARTNERS

**BlueRock Capital Markets**

# CALENDAR OF EVENTS

**December 2, 2021**

5:00-6:30 p.m.

**NexGen Happy Hour**

**Peanut, Shawnee**

**January 19, 2022**

11:30 a.m.-2:00 p.m.

**January Chapter Meeting and Lunch**

**Embassy Suites, Olathe**

**The Biden Tax Plan: Proposed Changes and Planning Opportunities**  
**Estate Planning For Income Taxes: Maximizing Step-Up In Basis For Couples**

**Jeffrey Levine, Lead Financial Planning Nerd for Kitces.com**  
**and President of Fully Vested Advice, Inc.**

**March 16, 2022**

11:30-2:00 p.m.

**March Chapter Meeting**

**Embassy Suites, Olathe**

**Economic Update**

**Chris Kuehl**

**May 18, 2022**

2:30-5:00 p.m.

**May Chapter Ethics 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>**