

The Newsletter of FPA of Greater Kansas City

News & Views

December 2022

FPA

FINANCIAL
PLANNING
ASSOCIATION


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WELCOME NEW MEMBERS


Winston Meyer, CFP®

2023 CHAPTER PARTNERSHIPS NOW AVAILABLE



FINANCIAL
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ASSOCIATION
GREATER
KANSAS CITY

Your Partnership Opportunities



Financial Planning Association
of Greater Kansas City

2023 Partnership Program

A MESSAGE FROM OUR 2023 PRESIDENT

Greetings All,

Happy Holidays!

As we reflect on this year there is one word that stands out above the rest – Busy! Dealing with a volatile market, economic uncertainty, post-covid transitions and not to mention, all the balancing acts we tend to daily, both professionally and personally. With that said, we hope you find a little time to unwind and relax this holiday season.

Thank you to the 2022 FPAGKC Board of Directors for the work they put into making this year a success. We had great in-person chapter meetings, a stellar turnout for our second annual Symposium, highlighted by Michael Kitces as our Keynote, and strong turnout at our NexGen happy hour events, all while maintaining strong chapter financials.

Thank you to our sponsors. You are an integral part of our success, not only for helping to support us financially, but through the additional value you bring in the form of added content, networking and education. We look forward to growing our partnerships even stronger in the coming year.

And of course, thank you to our members. Thank you for your loyalty, participation, contributions and

continuous feedback to helping grow the chapter and the positive impact it has within our local financial planning community.

As we reflect on the great successes of 2022, I can share that the 2023 Board is already hard at work, planning an even bigger year. We will provide more details at the January chapter meeting, but I am extremely excited to share that we are bringing back two chapter favorites in 2023 – the FPAGKC Golf tournament and the Career Fair! Much more to come on these events and other exciting chapter opportunities for next year. Be sure to read the weekly newsletters and follow the chapter on social media for important updates.



Best wishes this holiday season and we look forward to connecting with you again in the new year!

Sincerely,
Ben Skilling, CFP®
FPAGKC 2023 President



CAREER LISTINGS

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

2022 BOARD OF DIRECTORS

**Chair of the Board**

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

**President**

Carrie Ohm, CPFA
OneDigital

**President Elect**

Ben Skilling, CFP®
UMB

**Secretary/Treasurer**

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

**Director of Community Outreach**

Chris Lilley
The Insurance Partners

**Director of Membership**

Jason Newcomer, CFP®
Dogwood Wealth Management

**Director of NexGen**

Landon Warmund, CSLP®
Reliant Financial Services

**Director of Partnerships**

Jacob Watts, CFP®
Legacy Financial Strategies

**Director of Programs**

William Bohne, CFP®
Embark Financial

Directors of Public Awareness

Jack Giardino, CFP®
Inflection Point Wealth Advice



Nolan Keim
Mariner Wealth Advisors

**Director of Student Mentoring and Career Development**

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

Directors at Large

Jennifer Price, CFP®
Creative Planning, Inc.



Thomas Kaminski, CFP®
Benchmark Capital Group



Jennifer Malone, CFP®, CMFC
BMG Advisors



Eric Martinez, MBA, CRPC®
American Century

**Chapter Executive**

Brandy Johnson, CAE
FPA of Greater Kansas City

JANUARY CHAPTER MEETING

January 18, 2023

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

Embassy Suites Olathe

This meeting sponsored by:



**American Century
Investments®**



RECESSION LOOMS: BUT IS IT IMMINENT?

Stephanie Kelton

Stephanie is a leading authority on Modern Monetary Theory, a new approach to economics that is taking the world by storm. She is considered one of the most important voices influencing the policy debate today.

Her New York Times bestseller, *The Deficit Myth: Modern Monetary Theory* and the *Birth of the People's Economy*, shows how to break free of the flawed thinking that has hamstrung policymakers around the world.

In addition to her many academic publications, she has been a contributor at *Bloomberg Opinion* and has written for the *Financial Times*, *The New York Times*, *The Los Angeles Times*, *U.S. News & World Reports*, *CNN*, and many others.

GLOBAL MACROECONOMIC OUTLOOK 2023

Joyce Huang, CFA



Joyce Huang, CFA, is vice president and senior client portfolio manager for American Century Investments, a premier investment manager headquartered in Kansas City, Missouri. She is based in the company's New York office.

Joyce holds a bachelor's degree in economics from the Wharton School at the University of Pennsylvania. She is a CFA® charterholder and a member of the CFA Institute.

Registration Fees:

Members \$35

Non Members \$99

Continuing Education: CFP® 2 hours approved - Kansas Insurance 2 hours approved

REGISTER TODAY!

MARCH CHAPTER MEETING

March 8, 2023

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

Embassy Suites Olathe

ESSENTIAL GROWTH SKILLS FOR TODAY'S MODERN ADVISOR



Amy Franko

We're living in a disruptive time, one that has completely changed the way our prospects and clients engage with us and our services. This disruptive time is also full of opportunity for the individuals and firms that choose to build the modern mindsets, skill sets, and tools to succeed. It's why the FPA of Greater Kansas City is offering this unique experience for growth.

Join us for a 2-hour interactive masterclass program with focus on two essential skillsets for today's modern advisor: agility and executive presence. This program will cover the following topics:

- ***Trends Impacting Today's Leaders.*** You'll learn broad trends to consider as you are interacting with leaders and decision makers.
- ***Agility.*** Something once reserved for the sports field has now made its way into business and leadership. In past decades agility wasn't even on the business radar. But it has now been identified as a top skill to hire for and build within organizations. This portion of the program will define agility, provide tangible examples and strategies to apply the power of agility to your practice.
- ***Executive Presence.*** Often described as something hard to describe but easy to spot, executive presence is what indicates you are ready for that next client, that next assignment, that next level of growth. The great news is that it can be built. Amy will guide us through four pillars of executive presence, along with key action items to help you build it within yourself and your teams.

You'll take away strategies to apply immediately, along with additional support resources for your firm.

About Amy:

Amy Franko drives results for organizations through elevating their most important asset—their people. She works across professional services, technology, and the Fortune 1000 on sales strategy and sales training programs.

As a sales leader turned entrepreneur, her experience within large global organizations, such as IBM and Lenovo, has shaped her skills as a futuristic thinker and leader. She brings new perspectives to her clients, with a sharp focus on achieving strategic goals.

She has been featured in national industry publications such as Selling Power, Top Sales World, Chief Learning Officer, T+D Magazine, and Training Magazine.

Registration Fees:

Members \$35 Non Members \$99

REGISTER TODAY!



FINANCIAL
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Take 5

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



December 2022



FPA Retreat 2023: Register For This Truly Unique Experience

The financial services industry is chock full of conferences and events for financial advisers and planners, but none of them are like what you can experience at [FPA Retreat 2023](#). Taking place May 1-4 at the Hyatt Regency Coconut Point Resort and Spa in Bonita Springs, Fla., FPA Retreat 2023 is where you challenge your thinking, forge lasting connections, and nurture your desire to pursue excellence in financial planning. Register by January 31 to attend at the lowest possible rate with our special early bird pricing. [Register now](#) and we'll see you there!

Introducing the Psychology of Financial Planning Specialist Badge™ Program

With increased recognition of psychology's impact on financial behavior, there is a need for today's financial planning professionals to understand better how they can best serve their clients. In response, FPA announced a partnership to offer members access to the [Psychology of Financial Planning Specialist Badge™](#) – an on-demand program for financial planners with over 7 hours of video instruction and exercises. Developed by Dr. Brad Klontz, Psy.D., CFP®, and Dr. Charles Chaffin, the program includes 9 CFP® CE credits for those who complete the program. FPA members can [complete the program](#) at a discounted rate of \$495.

The December Journal of Financial Planning Now Available

FPA members can now read the December issue of the *Journal of Financial Planning* to explore donor-advised funds, the skills required to build the right team, individual retiree risk management, women and charitable giving, how to audit your firm's tech stack, the science of building trust and commitment in financial planning, and much more. [Access the latest issue](#) of the *Journal* now.

Check Out the New FPA Health Insurance Marketplace For Members

Get instant quotes and apply online for individual, group, and Medicare insurance products. The ACA open enrollment period starts November 1 in most states, so schedule an appointment with a licensed benefits counselor today. [Get started!](#)

The FPA Marketplace: Savings On the Products and Services You Need

The FPA Marketplace powered by the Chalice Network® is providing incredible savings to our valued FPA members. Through the Marketplace, you can access many benefits designed to help you professionally and personally, including our various insurance programs. In addition, you can also 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!](#)

Giving Is Good For Your Heart...and Your Clients

Philanthropy is an increasingly important area of opportunity for planners and clients. [Philanthropic Solutions in Financial Planning](#), an American Heart Association and FPA certificate program, presents philanthropic planning within the context of values-based planning and examines the multiple ways clients benefit from philanthropy and what advisors gain from incorporating philanthropic planning in their practice. Free to all. [Register now.](#)

FPA Members Can Save On Auto Insurance

There are countless options for auto insurance. That's why FPA has chosen Member Options to help our valued members. Savings have been reported as high as \$810! You can get multiple, no obligation quotes from up to five top carriers in a matter of minutes. Call Member Options at 833.378.8224 or visit member-options.com/fpa to get started today!

FPA Job Board Has Solutions To Help You Grow

FPA is making it easy for companies to find ideal candidates while supporting those looking for their next career opportunity. The FPA Job Board allows job seekers to showcase their skills and work experience to prospective employers and provides employers access to a qualified talent pool to fill open positions. In partnership with the Financial Job Exchange (FJE), the FPA Job Board aims to provide the most relevant jobs for candidates and the highest return on investment for employers. [See what the FPA Job Board can do for you!](#)

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.



RYAN INSURANCE
STRATEGY CONSULTANTS
Powered by Gallagher Affinity

CHAPTER PLATINUM PARTNERS



CHAPTER PARTNERS

GOLD PARTNERS



SILVER PARTNERS



BRONZE PARTNERS

BlueRock Capital Markets

CALENDAR OF EVENTS

January 18, 2023

Chapter Meeting

Embassy Suites, Olathe

March 8, 2022

Chapter Meeting

Embassy Suites, Olathe

May 1, 2023

Chapter Golf Tournament

Canyon Farms Golf Club

May 10, 2023

Chapter Meeting

Embassy Suites, Olathe

August 30, 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>

