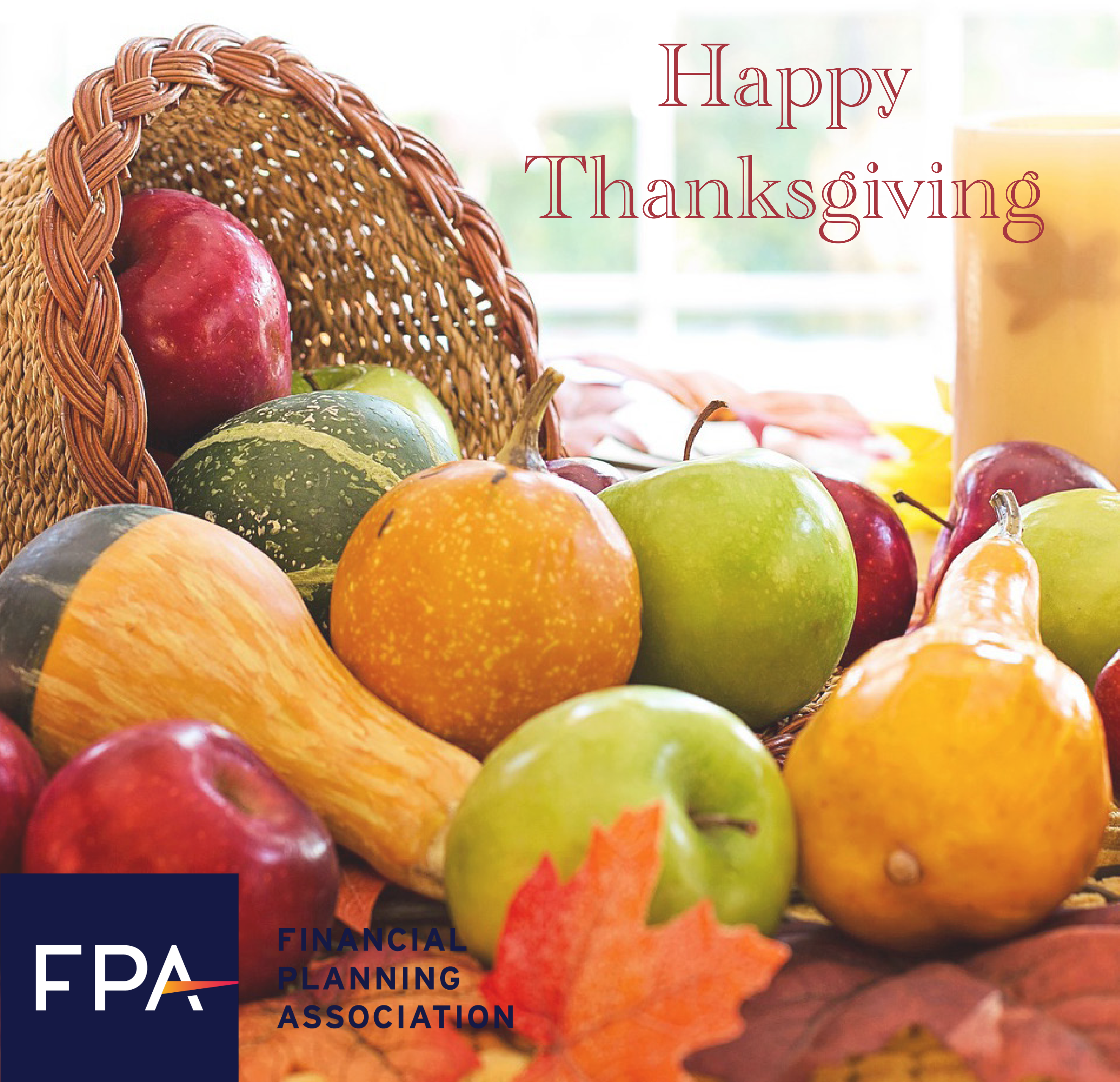
The Newsletter of FPA of Greater Kansas City

News & Views

November 2022



FPA
FINANCIAL
PLANNING
ASSOCIATION

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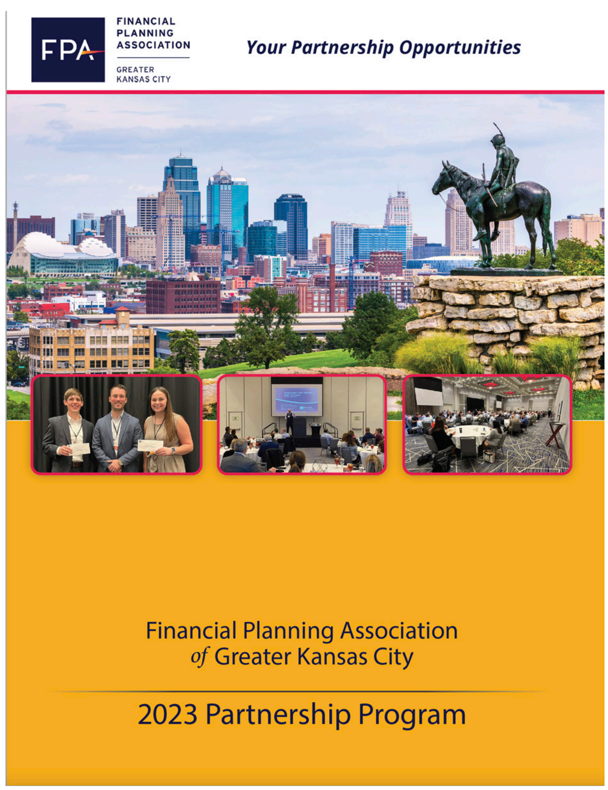
WELCOME NEW MEMBERS

Troy Stovern, CFP®
Jean Wilson, CFP®

2023 CHAPTER PARTNERSHIPS NOW AVAILABLE



PUBLIC AWARENESS COMMITTEE UPDATE

As Thanksgiving is around the corner, it's always enjoyable to sit down and reflect on the past year and all the things to be thankful for. As Co-Director of the Public Awareness Committee, I can assure you there is a lot that our committee has to be thankful for.

One of the things we are most thankful for is our fellow FPA of Greater Kansas City members. Our members have done a wonderful job at providing knowledgeable, and enjoyable to read, material for our semi-monthly articles that are published through The Kansas City Star. (If you would like to read through any of these articles, they can be found here: https://www.financialplanningassociation.org/fpa-greater-kansas-city-consumers)

Not only have our fellow FPA of Greater Kansas City members helped contribute to The Kansas City Star, they have also provided connections and introductions to other media outlets to help bring financial content to the Greater Kansas City area. A big thank you and shoutout to Jennifer Malone for providing an introduction to KC PBS.

From this introduction, we have been able to create and cultivate a relationship with KC PBS. This relationship has presented us with the opportunity to guest star on Mornings with Bryan Truta on 90.9 The Bridge as well as work with KC PBS to create quarterly video segments that will be aired on TV.

As we close out 2022 and look forward to 2023, The Public Awareness Committee's goal is to bring knowledgeable financial content to the Greater Kansas City community. Whether that be through newspaper articles, radio appearances, TV appearances, or guest starring on podcast shows.

If any members would like to get involved with the Public Awareness Committee, whether that be through writing, volunteering on the committee, or making introductions to potential media outlets, feel free to reach out directly to me or my fellow Co-Director, Nolan Keim.

A Special Thank you to the 2022 Public Awareness Committee:

Nolan Keim and Jack Giardino, Co-Chairs
Jamie Bosse
Lucas Bucl
Sandi Weaver
Kelly Stiefel Arias

We appreciate the support and are thankful for all of the FPA of Greater Kansas City members, our fellow board members, as well as the Greater Kansas City media outlets. Happy Thanksgiving to all!

Sincerely,
Jack Giardino, CFP®
FPAGKC 2022 Public Awareness Co-Chair

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®

ECONOMIC UPDATE

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 pending Kansas Insurance 2 hours pending

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!

FPA FINANCIAL PLANNING ASSOCIATION

Take 5

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

November 2022

Continued Savings to Attend FPA Annual Conference 2022 Still Available

If you were thinking of attending FPA Annual Conference 2022 in Seattle from Dec. 12-14 but think you missed out on the advance pricing that would have allowed you to register for a lower cost, we have some good news for you. We have decided to keep the special advance registration pricing in place from now until the conference. So, register today to join us in Seattle to see terrific keynote speakers like Sallie Krawcheck and Keith Ferrazzi, more than 50 breakout sessions with enough CE to satisfy many of your CFP® requirements, and so much more. Register now!

We Can Help: Supporting Those Impacted by Hurricane Ian

Hurricane Ian had a devastating impact on Southwest Florida. We all have read the news reports or watched the footage. Our hearts go out to all those coping with the hurricane's impact as they face a long rebuild in the months ahead. Many have asked how you can help. In a recent communication to all FPA Members, FPA President Dennis Moore, CFP®, and FPA CEO Patrick Mahoney provided information on how we can assist with financial support through the United Way of Florida and FPA's new Hurricane Ian Support Relief Community on FPA Connect. Learn more.

Hot Off the Press! The November *Journal of Financial Planning* Now Available

FPA members can now read the November issue of the *Journal of Financial Planning* to explore empathy and emotional intelligence in serving diverse clients, the value of employee resource groups, the three most important trends in wealth management, cultural diversity and risk management, the role of financial planners on African American business owners' personal credit and access to capital, and much more. Access the latest issue of the *Journal* 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

Take 5

Utah Valley University Named Winner of the 2022 Financial Planning Challenge

FPA, Ameriprise Financial, and CFP Board are pleased to announce that the student team from Utah Valley University in Orem, Utah, has been named the 2022 Financial Planning Challenge winner. This annual competition provides students in financial planning programs across the country with a forum to showcase their knowledge and planning acumen on a national stage. Congratulations to the student competitors: Abby Adams, Colten Orton, Siria Trochez, and their faculty advisor Hyrum Smith, Ph.D., CFP®, CPA. Learn more.

Live Webinar: The Top 10 Charitable Trends Every Adviser Should Know Before the End of the Year

Join the American Heart Association on Nov. 29 at 2:00 p.m. ET for a deep dive into the top 10 trends that directly impact the charitable planning landscape. Learn how tax changes are impacting charitable giving, raising the right charitable question at the right time with clients, and all about the hottest charitable planning trends/vehicles following tax act changes. This event qualifies for 1 CFP® CE credit. Register now.

Build Your Awareness with FPA MediaSource

FPA MediaSource has sent more than 6,500 journalist queries to FPA members over the past five years. That's a lot of media attention for those members, so don't miss out. To get started, simply take the on-demand 90-minute media training available through FPA. Simply access the training on-demand whenever you're ready. Once the session is concluded, you will be invited to join FPA MediaSource so you can start to get the journalist queries in your inbox every day! Take the training now to get started!

CHAPTER PLATINUM PARTNERS

AE WEALTH MANAGEMENT

American Century Investments®

LearningQuest®
529 Education Savings Program

Greater Kansas City Community Foundation℠

FAIRWAY®
INDEPENDENT MORTGAGE CORPORATION
NMLS#2289

REVERSE MORTGAGE PLANNER

John Hancock®

CHAPTER PARTNERS

GOLD PARTNERS

Allianz

Community Lending of America Inc.

SILVER PARTNERS

ASH BROKERAGE

AMERICAN FUNDS® From Capital Group

First Trust

FlexShares® EXCHANGE TRADED FUNDS

NORTHERN FUNDS®

MANAGED BY NORTHERN TRUST

UMB® BANK

BRONZE PARTNERS

BlueRock Capital Markets

CALENDAR OF EVENTS

December 1, 2022
NexGen Happy Hour
Coach's Overland Park

January 18, 2023
Chapter Meeting
Embassy Suites, Olathe

March 8, 2022
Chapter Meeting
Embassy Suites, Olathe

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

CAREER LISTINGS

Symphonic Wealth Management
Wealth Management Support Specialist
Posted October 25, 2022

Ascend Wealth Management
Associate Lead Advisor
Posted September 23, 2022

Stepp & Rothwell
Associate
Posted September 16, 2022

Keating
Associate Financial Planner
Posted August 24, 2022

UMB
Financial Planner
Posted August 11, 2022

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