The Newsletter of FPA of Greater Kansas City

News&Views

April 2022

FINANCIAL PLANNING ASSOCIATION

GREATER KANSAS CITY

IN THIS ISSUE:

SAVE THE DATE!

AUGUST 31, 2022

2nd Annual Symposium

Embassy Suites, Olathe

Featuring Keynote Speaker Michael Kitces

Sponsorship and Exhibit opportunities available, learn more

FPA of Greater Kansas City

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BJohnson@OneFPA.org
www.fpakc.org

CAREER LISTINGS

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

A WORD FROM FPA NEXGEN

by Landon Warmund, CFP®, CSLP, Director of NexGen

We have so many opportunities for new and aspiring financial planners within the Kansas City Chapter of the Financial Planning Association. As the Director of NexGen, I wanted to share some of what we have going on with you and what our NexGen group is all about!

What is NexGen with FPA?

NexGen gives new and aspiring Financial Planners the opportunity to network, find support, and grow with other new and aspiring planners within the industry. Our goal is to connect you with the tools and resources that you need to develop into the future self that you want to be within the industry.

Local Events

Typically we host a happy hour the first Thursday of every month at a spot around the Kansas City area. This is a time to make new friends in our industry who you may share experiences with. It's an opportunity to learn more about the industry, ask questions and gain new perspectives. Occasionally we will bring in industry partners to sponsor these events as well.

Scholarships & NexGen Gathering

We have scholarships available for the national NexGen Gathering event in Las Vegas! Gathering is a time where young financial planners across the country come to one spot to collaborate, network, and learn how they can advance themselves within the financial planning profession. For younger planners, this is a game changing conference! I attended back in 2019 and plan to attend again this year because it's such a wonderful opportunity. We are giving two $600 scholarships away in hopes to send a total of three individuals from Kansas City to this event. Download the application. The deadline of April 29th is quickly approaching so feel free to email me for additional information at lsw@reliantfin.com.

Landon Warmund, CFP®, CSLP
FPAGKC 2022 Director of NexGen

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MAY CHAPTER MEETING

May 18, 2022

2:30 - 5:00 pm

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

This meeting sponsored by:

Greater Kansas City Community Foundation℠

Converting Complex Assets to Charitable Dollars

Chris Rigsby
Relationship Manager
Greater Kansas City Community Foundation

Corey Ziegler
General Counsel
Greater Kansas City Community Foundation

Cash gifts to charities are easy to make and universally accepted, but individuals may realize added tax benefits by making gifts of appreciated assets that they have held longer than a year. Charities that are equipped to accept not only publicly traded securities but also more "complex" assets like interests in closely-held businesses or real estate can significantly broaden their contribution base. In addition to discussing the growing trend in gifts of closely-held business interests in particular, this presentation will cover other popular "complex" assets that can be donated to charity, and some key issues that individuals and charities should be aware of in handling those gifts.

Adapting Complex Money Topics into Easily Understandable Conversations for Youth, Adults and Small Businesses Owners

Latasha Wilson
Executive Director, *Pathway Financial Education*

Registration Fees:
Includes CE and reception
Members $29
Non Members $99
Continuing Education: CFP® 1 hour approved Kansas Insurance 1 hour 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 2022

Latest CEO Update Highlights FPA's Recent Efforts on Behalf of Members

Each quarter, FPA CEO Patrick Mahoney provides a look at what the Association has been doing to support members, empower chapters, and elevate the profession. The first quarter of 2022 was busy for FPA that featured new partnerships, exciting new benefits for members, important advocacy work, and much more. Read Patrick's latest update now to see how FPA as **Your Partner in Planning™** is more than catchy tagline!

Registration is Now Open for FPA NexGen Gathering 2022 - in Las Vegas!

After two years in the virtual world, FPA NexGen Gathering is back in-person and better than ever. For the first time Gathering will take place in a resort atmosphere rather than a college campus. The venue may be different but the main draw of the event remains the same: FPA NexGen Gathering 2022 is built by, and for, those who are new to the financial planning profession. Experience a community-style learning environment with peer-led sessions and roundtable forums that allow you to increase your professional knowledge, form lasting relationships, and leave inspired to put what you learned into action. Join us August 23-25 at the Flamingo Las Vegas Hotel and Casino. Register by May 6 and attend at $100 off the regular registration fee!

The April *Journal of Financial Planning* is Now Available

FPA members can now read the April issue of the *Journal of Financial Planning*, powered by UnitedHealthcare, to learn more about succession and transition planning, the impact of financial technology on behaviors, distribution of inherited IRAs, and much more. Access the latest issue of the *Journal* now.

FPA Media Training Program is Now On-Demand

The media training program for FPA members who want to be part of the popular FPA MediaSource system is now available whenever you want. No longer do you need to wait for a live, quarterly training. Simply access the training on-demand whenever you're ready. Once the 90-minute 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!

Take 5

Carson Coaching Becomes FPA's Official Coaching Partner

With an eye on helping members serve their clients, grow their firms, and leave a lasting impact, FPA is pleased to announce that Carson Coaching has become the Association's official coaching partner. Through the partnership, Carson Coaching is providing several exciting opportunities for FPA members to positively impact themselves and their businesses. Members can now access Carson's online coaching center, monthly group coaching, discounts to attend many Carson programs, and much more. Learn more about all that is now available to you as an FPA member. Be sure to check out the recording to learn more about what the partnership means for you!

As Your Partner in Planning, FPA Has the P-L-A-N for You

FPA's web experience has been improved to make it easier for members to find what they want – when they want it. The website's navigation has been simplified and is now based on a P-L-A-N structure, which includes the verticals Practice Support, Learning, Advocacy, and Networking. The latest and most relevant member benefits are easily found on the homepage and ongoing updates are taking place to ensure members can find and engage with the benefits they want. Visit the refreshed FPA website now!

FPA Members Save 15% Off Eligible Kaplan, Inc. Programs

As an FPA member, your members can save on various Kaplan, Inc. programs, including licensing exam prep, education programs for professional designations, CFP® certification and more. In addition, the College for Financial Planning®—a Kaplan Company offers scholarships to pursue CFP® certification, a professional designation, or a Master of Science Degree in Personal Financial Planning. Learn more.

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BlueRock Capital Markets

CALENDAR OF EVENTS

May 5, 2022
5:00-6:30 p.m.
NexGen Happy Hour
Harpos, Westport

May 18, 2022
2:30-5:00 p.m.
Chapter Meeting
Embassy Suites, Olathe

August 31, 2022
Symposium
Embassy Suites, Olathe

September 21, 2022
11:30-2:00 p.m.
Chapter Meeting
Embassy Suites, Olathe

October 19, 2022
Chapter Meeting
Embassy Suites, Olathe

November 16, 2022
ETHICS Chapter Meeting
VIRTUAL

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

WELCOME NEW MEMBERS

Christopher T. Nelson, CFP®