



**FINANCIAL
PLANNING
ASSOCIATION**

**GREATER
KANSAS CITY**

2022 FPA of Greater Kansas City Symposium

August 31, 2022

Embassy Suites-10401 S Ridgeview, Olathe, KS

The FPA of Greater Kansas City's Second Annual Symposium will take place in-person on August 31, 2022 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. Earn four hours of CFP CE and Kansas Insurance CE, and plan to attend the Super CE session for an additional 13 hours of CE.

We are pleased to welcome Michael Kitces as the Symposium Keynote Speaker. Kitces will speak at two one hour general sessions as well as a limited ticketed VIP luncheon.



SCHEDULE OF EVENTS

8:00 – 8:30 am

Breakfast/Networking/Exhibit Hall

8:30 –9:30 am

No CE

KEYNOTE SESSION

Rethinking Advisor Marketing to Generate More Scalable Growth

Michael E. Kitces, MSFS, MTAX, CFP, CLU, ChFC, RHU, REBC, CASL

For decades, the most common way that established financial advisors grow is via referrals from their existing clients. And as a result, the average financial advisory firm spends just 2% of its revenue on marketing. Yet in practice, it's not clear whether growing with referrals is really a best practice, or simply the only source of growth that's left when advisory firms spend on little else to market their services! In this session, we delve into the latest Kitces Research on what financial advisors are actually doing to successfully market themselves, the typical cost to acquire new clients and how it varies by marketing channel, why some marketing strategies are significantly more scalable than others, and the best approach to determine the right budget for marketing expenses for your advisory firm!

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SCHEDULE OF EVENTS

9:40 – 10:30 am
1 hr CFP/1 hr KS Ins

BREAKOUT SESSIONS

Has Factor-Building Been Overdone? Assessing Tradeoffs in Systematic Strategies

Phil McInnis, Chief Investment Strategist at Avantis Investors®

Financial science and our understanding of what drives asset prices have evolved considerably. The implications on the financial services industry have also been significant, including the introduction of passive index funds, single-factor and multi-factor strategies. But has factor-building been overdone, and are there risks to becoming too factor focused?

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1 hr CFP/1 hr KS Ins

Three Rules for Successful LTC Planning

Amy Lozier, Great Plains Divisional President, Ash Brokerage

LTC planning is not about owning or purchasing various insured options. To the contrary; healthcare in retirement is all about having a plan in place in the event a member of the family has a chronic disability. Ash Brokerage has found many planners and families chose to delay and in some instances ignore the conversation about a plan. We will help you understand simple formats and questions to lean into "having the talk" towards having the prepared plan in place for management of chronic disability. After a plan has been established many families choose to explore funding options beyond self-insurance of time and financial resources. We will educate you on various third party funding options available if funding is a direction to be fully or partially allocated towards. Ash Brokerage's approach to LTC planning is always first to have an established plan in place then considerations of protecting it, if desired.

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9:40 – 10:30 am
1 hr CFP/1 hr KS Ins

Managing Irrevocable Trusts Assets: Heed the Guardrails

Mike Flinn, National Sales Manager, BOK Financial

In the common Advisor-Client relationship, the advisor is bound by both regulation and ethics to the "Know Your Client" standards. FINRA Rules 2090 (Know your customer) and 2111 (Suitability) ensure advisors know detailed information about their clients' tolerance for risk, understanding of investments, and which investments are prudent for a clients' personal circumstances. However, when an advisor is hired by a trustee through delegation to manage assets in an irrevocable trust, two very distinct and

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significant differences enter into play beyond the scope of an advisor's traditional relationship with an individual investor. This session will take a closer look at why these two characteristics are often overlooked and misunderstood by advisors.

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ADVISOR TRUST SERVICES

1 hr CFP/1 hr KS Ins

Student Loan Planning in 2022: What You Need to Know

Jason Anderson, Founder, Gradmetrics

This year has been a big one for federal student loans, including the continuation of COVID-19 relief measures and the introduction of new programs designed to ease the burden of student loans. Importantly, the Biden administration has announced game-changing initiatives for student loan forgiveness. Specifically, this workshop covers Public Service Loan Forgiveness (PSLF), the temporary PSLF waiver program, student loan repayment plans, consolidation, and other loan forgiveness opportunities. This workshop will help you efficiently get up to speed. Are student loans fueling your clients' anxiety? Help your clients stop making unnecessary mistakes and get on the right plan that fits their life goals. Join Jason Anderson, CPA, CFP®, CSLP® and founder of Gradmetrics as he guides you through the complex world of repaying student loan debt. For many families, education planning is their primary financial concern, even before retirement. Education and student loan planning continues to be a "blue ocean" opportunity for your firm – clients desperately need this information, and few professionals can provide it.

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Gradmetrics

10:30-10:50 am

Break/Exhibit Hall Networking

10:50 – 11:40 pm

1 hr CFP/1 hr KS Ins

BREAKOUT SESSIONS

Controllable vs. Uncontrollable: Navigating Risks to a Retirement Spending Plan

Micha Baxley, Allianz Life

A critical element of a successful retirement spending plan is creating a consistent and sustainable income. When creating a plan there are four main variables you can control: the client's retirement age, pre-retirement contributions, retirement income amount, and the asset allocation of the portfolio. After identifying a spending plan based on what clients can control, the plan is still exposed to four major uncontrollable risks:

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longevity, market returns, inflation, and portfolio shocks.

This session uses Monte Carlo analysis to help you better understand the impact of changing the factors clients can control as well as how sensitive the portfolio may be to uncontrollable risks. Additionally, we'll evaluate the efficacy of adding a Registered Indexed Linked Annuity (RILA) with guaranteed lifetime income through an income benefit rider that is available for an additional cost to the traditional equity and bond portfolio to help clients better handle the uncontrollable risks they will face in retirement.

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1 hr CFP/1 hr KS Ins

Big Ideas 2022

Ryan Hodapp, Vice President, Product Specialist, ARK Invest

Dan White, Client Portfolio Specialist, ARK Invest

Innovation is the key to long-term growth. Despite its potential, innovation can take longer for the mass market to adopt. Perception is key and investors should focus on promising areas of disruptive innovation, including those missed or underrepresented by traditional investment styles. According to ARK Invest Founder, CEO and Chief Investment Officer Catherine D. Wood, "Disruptive innovation is not priced correctly by traditional investment strategies because people don't understand how big the ultimate opportunities are going to be. They aren't sizing the opportunity and they aren't analyzing the disruption." This program will discuss 11 critical technologies in the disruptive innovation categories that comprise the major innovation platforms, how they may lead to growth, and how to potentially capitalize on those opportunities.

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1 hr CFP/1 hr KS Ins

The Tax Return as a tool for Tax Minimization and Investment Planning

Kevin Thornton, VP of Wealth, Head of Sales, AE Wealth Management

Erik Blankmeyer, VP of Business Development, AE Wealth Management

The tax return, when paired with an investor's current investment statements, can be a powerful window into potential solutions to help your clients reach their financial goals. In this session, attendees will learn what information you need to review, what specific data points tell you about their financial and tax planning needs, how to use that data to develop an investment plan that both minimizes taxes and helps them reach their

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investment goals while also showing how to work this planning process into the sales process and client review meetings.

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1 hr CFP/1 hr KS Ins

Technology and Cybersecurity 2022: Trends and Best Practices

Wes Stillman, CTO of RightSize Solutions

Wes will review the top RIA technology and cybersecurity trends in 2022, and how to leverage technology to gain a competitive advantage and do better business, including: managing work from home and other recent workforce shifts, an update on what you need to know about the SEC Proposes Rules on Cybersecurity, why Invest in Cybersecurity, the Motivating Factors, where Can Your Firm Improve? The Battle Plan, The Human Factor, and The Arsenal.

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11:40-12:45 pm

Lunch/Networking/Exhibit Hall

Ticketed VIP lunch with Michael Kitces

Limited tickets will be sold benefiting the FPAGKC Scholarship Fund

12:40- 1:30 pm

1 hr CFP/1 hr KS Ins

BREAKOUT SESSIONS

HECM for Purchase

Lee Smith, Loan Officer and Certified Reverse Mortgage Planner,
Fairway Independent Mortgage Corporation

What is the best way to purchase a home in retirement? Should my client pay cash or take out a loan? How does that impact their long-term retirement goals? What if there was a way for the client to preserve retirement funds and still buy a home that fits their needs? Join us for the Home Equity Conversion Mortgage for Purchase session to see a better way to purchase a home in retirement rather than using cash or a traditional mortgage. A HECM (also known as a reverse mortgage) is backed and insured by the Federal Housing Administration (FHA) and allows clients 62 years of age or older to utilize the equity in their home. As long as the client pays property taxes, home owners' insurance, HOA dues (if any), and lives in the home as their primary residence they are able to stay there until they decide to leave or pass away. Come learn how this program works, the guarantees that come with it, and the protection for the client and the heirs.

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1 hr CFP/1 hr KS Ins

High Impact Private Placements: The Galaxy's Guide for Advisors & RIAs

Trey Corbett, Director of Investments at the Greater Kansas City Community Foundation and Liz Sessler, Chief Operating Officer at CapShift

The Greater Kansas City Community Foundation, in partnership with CapShift, will lead a discussion on private impact investments and recoverable grants. Attendees will learn about the different types of vehicles used for private impact investments and recoverable grants, including debt, equity, and VC. The presentation will also cover why donor-advised funds are a great entry point for these types of investments and some key issues to consider, including risk and return characteristics, compliance, due diligence and deal sourcing. The session will end with a Q&A.

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NO CFP/1 hr KS Ins

Your Game Plan

Brian Willet, Co-Founder & CEO, Advisor Game Plan

Your Game Plan is a strategic session designed to help a financial advisor create both a financial plan and a strategic plan for their financial planning practice. This session is a learning experience to equip each participant with next steps to build their business plan or update an existing business plan. This session will include topics around Vision, Mission Statements, Core Values, and Beliefs, then it will touch on Goals/Actions, Habits, and Metrics. At the end, Advisor Game Plan hopes to encourage advisors to think strategically and consider how they can make positive changes to their practice and help innovate our industry to be more financial planning focused than product sales focused.

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1 hr CFP/1 hr KS Ins

Planning for Change in Retirement with Guardrails

Justin Fitzpatrick, Co-Founder, Income Lab

Evidence and common sense report that retirees don't fail in retirement – they adjust. In this session we'll discuss robust techniques for developing and monitoring realistic dynamic retirement income plans. To be fruitful in a practice, dynamic planning methods need to be scalable across client situations and throughout client lifetimes, so we'll discuss how to incorporate changing longevity expectations, portfolio returns, non-

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portfolio income timing (e.g., Social Security), and a full range of other client idiosyncrasies. We'll then talk about how advisors can present sophisticated dynamic plans in clear, understandable ways and set client expectations by defining dollar-based guardrails at which adjustments will be made.

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1:30-1:50 pm

Break/Exhibit Hall Networking

1:15 – 2:15 pm

1 hr CFP/1 hr KS Ins

KEYNOTE SESSION

Applying Behavioral Finance In Your Financial Planning Practice

Michael E. Kitces, MSFS, MTAX, CFP, CLU, ChFC, RHU, REBC, CASL

An increasing volume of research is making clear what financial planners have long known – that clients do not always act in a purely rational manner. But it's one thing to recognize that clients sometimes make irrational decisions, and another to really understand what drives those decisions and how to help clients avoid the most damaging mistakes. In this session, advisors will learn what the behavioral finance research has shown about our not-always-rational decision-making process, and how to consider making adjustments to the delivery of their financial planning services to help clients achieve more desirable outcomes through better communication and enhanced trust.

2:50-3:15 pm

Break/Exhibit Hall Networking

3:15 – 4:15 pm

SUPER CE SESSION

An Advisors Guide to 401k plans*

John Robertson, CLU, CPFA, Regional Vice President, John Hancock This

This session will cover: types of Retirement Plans, setting up a retirement plan, plan design, fiduciary Responsibilities

The presentation will provide 1 hr insurance, cfp, CIMA following the presentation a link for a 50 question multiple choice exam will be provided for an additional 13 hours insurance CE and 5 hrs CFP! You will have one week to complete the exam. This is a great opportunity to earn a lot of CE!

***If you plan to attend this session you must complete the separate registration that will be provided with the Symposium confirmation email.**

Sponsored by:



4:15 – 4:45 pm

Closing Session/Scholarship Announcement/Door Prizes

4:45 pm

Happy Hour

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MEET THE SPEAKERS

KEYNOTE SPEAKER



MICHAEL E. KITCES., MSFS, MTAX, CFP®, CLU, CHFC, RHU, REBC, CASL

Michael E. Kitces is the Head of Planning Strategy at Buckingham Wealth Partners, an independent RIA with more than \$50 billion of assets under management, that provides private wealth management to consumers and turnkey asset management platform services to advisors.

In addition, he is a co-founder of the XY Planning Network, AdvicePay, New Planner Recruiting, fpPathfinder, and FA BeanCounters, the former Practitioner Editor of the Journal of Financial Planning, the host of the Financial Advisor Success podcast, and the publisher of the popular financial planning industry blog Nerd's Eye View through his website Kitces.com, all dedicated to advancing knowledge in financial planning and making financial advisors better and more successful.



Jason Anderson is a seasoned college and student loan consultant focused on affordability, student success, and financial common-sense. Jason holds an extensive professional background including roles as a faculty member in the school of business at the University of Kansas, entrepreneur, and professional college & career planning consultant. He is a Certified Public Accountant (CPA) in the State of Kansas, a CERTIFIED FINANCIAL PLANNER™ professional, and a Certified Student Loan Professional®. Jason holds two master's degrees in business (MBA) and education (MA) and is pursuing his doctoral degree in personal financial planning program at Kansas State University.



Micha Baxley has spent over 20 years in the financial services industry, mostly working within the RIA community. In his prior role he has helped countless advisors start an RIA and transition some or all of their business to the fee based world. Micha is currently working with Allianz Life to help them focus on the RIA community with their suite of low cost, non-commission, fee billable annuities. He lives in Fort Worth Texas with his wife and two kids and enjoys doing anything outdoors.



Erik Blankmeyer brings a vast array of business development, sales management, financial analysis and marketing strategy skills to the AE Wealth Management team. Erik joined AEWM following a successful career with TD Ameritrade Institutional, where he served as vice president of institutional sales. During his tenure with TD Ameritrade, Erik increased annual RIA, breakaway brokers, family office, hedge fund and asset management sales in his region to \$1 billion from \$50 million. A graduate of Brigham Young University, Erik earned his Bachelor of Science degree in economics. He has more than 25 years of financial services experience and has passed his Series 7, 63 and 65 securities exams. He also holds several professional certifications.

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Outside of the office, Erik enjoys spending time with his wife, Rhoberta, children and grandchildren. Erik enjoys the great outdoors and has done multiple triathlons and 100-mile bike races with Rhoberta. He has a passion for working with his hands; you can often find him building, welding, finishing basements, and working on cars, airplanes and motorcycles.



Trey Corbett serves as the Director of Investments for the Greater Kansas City Community Foundation. As a Chartered Financial Analyst with more than 15 years of investment experience, Trey provides strategic oversight to all investment activities, offering information and guidance on economic and investment trends to the Community Foundation's Investment Committee. He regularly meets with fundholders to help them understand how they can tailor their investment strategies to their philanthropic plans. Trey joined the Community Foundation staff in 2017. Previously he was employed with Waddell & Reed and Ivy Investments. Trey earned his undergraduate degree in economics from the University of Kansas.



Justin Fitzpatrick spent over 15 years in financial services. Justin has led teams in advanced financial planning and portfolio strategy, managed development of financial technology tools, and designed and executed strategies to enter new markets. Prior to his work in financial services, he spent seven years in academia. He has taught at the Massachusetts Institute of Technology (MIT); Harvard University; Queen Mary, University of London; and the University of California, Los Angeles. Justin has dedicated his career to being a teacher and student of financial planning and to advancing innovation in the industry. Justin is an experienced public speaker and writer and his research and thought leadership on retirement income planning has appeared in many well-known industry publications. Justin earned a BA from the University of Michigan and a PhD from MIT. Justin is a Chartered Financial Analyst (CFA) Charterholder and a Certified Financial Planner (CFP) professional.



Mike Flinn brings 25 years of dedicated service and experience to the "Advisor Friendly, Unbundled, Custodian Agnostic" independent trust company offering. He excels at consulting with financial advisors on strategies to deepen and expand their book of business with personal trusts. Mike helps dispel the oft misunderstood myth that "irrevocable means immovable" by identifying the steps required to move a trust and the relationship between the trustee, advisor, and their client. Widely considered a "pioneer" in this unique and expanding arena, Mike is regularly quoted in leading industry publications and continues to be a featured speaker at the financial industry's largest conferences as a subject-matter-expert and "thought leader". During his 25 year career, he has enabled advisors to capture over \$5 billion in new trust assets. Mike holds a bachelor's degree in Industrial Engineering from the University of Arizona where he was a member of their 1980 National Championship Baseball team. Additionally, he served as a member of the Central Arizona United States Tennis Association (USTA) Board of Directors and captained the 2012 National Champion Men's USTA 4.5 team.

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Ryan Hodapp serves as a vice president in the Sales division of Resolute Investment Managers, Inc., the parent company of American Beacon Advisors, Inc. His product specialist role entails coordinating and supporting the national sales efforts for all products and strategies that Resolute markets on behalf of ARK Investment Management, LLC, including ETFs, separate account strategies and a mutual fund. Prior to joining Resolute in 2021, Mr. Hodapp worked for Waddell & Reed, where he helped financial advisors with complex portfolio construction cases. With more than 20 years of experience in the industry, Mr. Hodapp began his career at A.G. Edwards & Sons in 1998. Over the years, he has held the positions of manager research analyst at A.G. Edwards and Bank of America, and senior client portfolio manager at Columbia Threadneedle. He has also worked in an analyst relations capacity at Wells Fargo Asset Management and USAA Investments. Mr. Hodapp earned an M.S. in Banking & Financial Services Management from Boston University. He received a B.S. in Finance from St. Louis University. He is a CFA® charterholder and CAIA® certificant. He holds FINRA Series 7, 24 and 63 licenses.



Matt McAvoy graduated with a bachelor's degree in economics from Benedictine College in 1981. While in college, he became licensed to sell insurance and joined his father's company, Louis J. McAvoy and Associates, Inc. In November 1981 and its successor company, Target Insurance Services, Inc. In November 2018, Matt sold Target Insurance Services, Inc. to Ash Brokerage Holdings, LLC. Matt is very passionate about working through financial professionals to work in their clients' best interests. He focuses on designing and implementing risk solutions using life insurance, retirement income annuities, disability income insurance and longterm care funding. Matt has completed his Chartered Life Underwriter and Chartered Financial Consultant designations, and Master of Science, Financial Services degree from the American College. AddHe is a past President of The National Association of Independent Life Brokerage Agencies, and a past Director of Life Happens. While Matt was President of The National Association of Independent Life Brokerage Agencies one of NAILBA's program efforts he helped implement was the integration of American Council of Life Insurance(ACLI) anti-money laundering testing as an accepted testing benchmark for life insurance agents satisfying their anti-money laundering thresholds under The Patriot Act with multiple insurers. Matt and wife, Sheryl, have a daughter, Caitlin, and two Golden Retrievers, Archer and Truman.



Phil McInnis is chief investment strategist at Avantis Investors®. In this role, Phil is involved in the research and design of Avantis' strategies and strategic allocation models. Phil also oversees all marketing content development surrounding Avantis' investment approach and meets regularly with advisors and institutions to discuss various investment topics and explain Avantis' investment capabilities. He frequently speaks at a variety of industry events on topics surrounding factor investing, asset allocation, and communicating with clients. Prior to Avantis Investors' establishment in 2019, Phil was a vice president and head of portfolio solutions at Dimensional

Fund Advisors in Austin, TX, where he oversaw a team charged with developing content to explain Dimensional's investment approach and helping clients on topics related to asset allocation, manager evaluation, and risk budgeting. Prior to Dimensional, Phil was an Investment Consultant at Towers Watson (now Willis Towers Watson), working predominately with corporate and public defined benefit and defined contribution pension plans. Phil earned a bachelor of business administration in finance from the Goizueta Business School at Emory University.

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Liz Sessler is a founding member of the CapShift Executive Team and oversees multiple parts of the team, including Technology & Product, Client Experience, and Marketing. Prior to CapShift she co-founded and was a senior vice president at ImpactUs Marketplace LLC, a broker-dealer, focused on making private impact investments more accessible to investors and advisors. Liz helped develop ImpactUs as the director of innovation at Enterprise Community Partners. Earlier in her tenure at Enterprise, she oversaw the launch of Enterprise's first retail investment product. Liz began her career at Calvert Impact Capital. She has also worked internationally connecting small and growing businesses with capital and technical assistance services. Liz has a BA in Public Policy Analysis from the University of North Carolina at Chapel Hill.



Lee Smith is a Loan Officer and Certified Reverse Mortgage Planner with Fairway Independent Mortgage Corporation with 10+ years in lending. He loves connecting people with the best solution for purchasing or refinancing the home that fits their life. In addition to traditional mortgage solutions, Lee is one of the leading local experts in the largely misunderstood reverse mortgage space. He enjoys educating clients and their important advisors on the real benefits of this option and its many potential uses to improve retirement. Lee is a native Missourian who enjoys the outdoors in his rural KC home where he does life with his wife and three young children. His Midwest upbringing instilled in him the value of people and relationships. These and other traits, like his transparency and direct conversations, make him the perfect fit to support others in making the best financing decisions for what is most people's largest asset, their home. In addition to spending time with his family, Lee is active in his local church and coaches Cross Country for the Kingsville R1 School District.



Wes Stillman founded RightSize Solutions in 2002 after 30+ years of managing technology in high-level position. He founded RightSize Solutions because Registered Investment Advisors (RIAs) needed a technology partner who really understood their needs. More than twenty years later, he remains committed to understanding every nuance of his clients' businesses. Prior to RightSize Solutions, Wes' clients included major airlines, broker dealers, trust companies, health care providers, community banks and other financial institutions. He has held high-level positions at National Advisors Trust Company, FSB, Comdisco, and Midwest Consulting Group. A technology-pioneer in every sense, Wes is quoted as a subject matter expert in industry publications and speaks at conferences on topics such as cybersecurity, cloud-based environments and leveraging technology.



Kevin Thornton worked as a financial advisor and then as an internal wholesaler and a hybrid wholesaler on the 401(k) team at Ivy Investments prior to AEWM. As a team leader, he applies the knowledge he gained in those roles to consult with advisors about their overall practice; provide insights regarding appropriate business structures; and give suggestions about sales, marketing and branding strategies. Kevin is a graduate of the University of Kansas, where he earned his Bachelor of Science in accounting and finance. He holds a life and health insurance license and has passed the Series 6, 7, 63 and 65 exams. Kevin and his wife, Ashley, have two sons, Parker and Carson. Kevin is an avid KU Jayhawks fan and enjoys trap/skeet shooting, going on wine-tasting tours and volunteering in his church.

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Dan White joined ARK in February 2021. As ARK's Client Portfolio Specialist, he partners with ARK's investment team to create and deliver insight and analysis to internal and external clients. Prior to ARK, Dan was Vice President and Investment Strategist at Bank of America. His primary responsibilities were investment manager due diligence and portfolio construction for the model portfolios offered at Merrill Lynch and U.S. Trust Private Bank. Dan is a CFA Charterholder, and earned his Bachelor of Science in Finance from the University of Rhode Island.



Brian Willet passion in financial planning all began in 2007 when he started an independent financial advisor practice at an independent broker-dealer, Waddell & Reed. He approached their client growth and service from an innovative coaching model and pricing structure. His passion grew as he moved into a leadership position consulting with other independent financial advisors coping with the drastic changes and uncertainty coming to our industry. He became a student of leadership, addicted to leadership skills that take surviving to advisors to thriving advisors. After innovating Waddell & Reed for almost 14 years, he decided that while he was in the right industry, he could make an even greater impact as a coach and mentor detached from any bias of a specific custodian or wealth manager. His goal was to be an executive coaching structure staying focused purely on the financial advisor, their vision and helping them align their action. His most important role in life is being the best husband to wife Michelle and father to children, Asher (8) and Zara (5). It is a privilege to lead and mentor our family each day no matter all the challenges that come in life. I believe it is important to know our priorities and mine stay firmly prioritized in the order of faith, family, and then my professional services.

REGISTRATION

	Before July 15	After July 15
Member	\$179	\$199
Non Member	\$279	\$299
Full Time Student	\$99	\$99
VIP Luncheon with Michael Kitces benefiting the FPAGKC Scholarship Program \$150 (limited to first 12)		

Registration includes continuing education, continental breakfast, lunch, breaks and happy hour.

[REGISTER TODAY!](#)