The Newsletter of FPA of Greater Kansas City

News&Views

January 2023

FINANCIAL
PLANNING
ASSOCIATION

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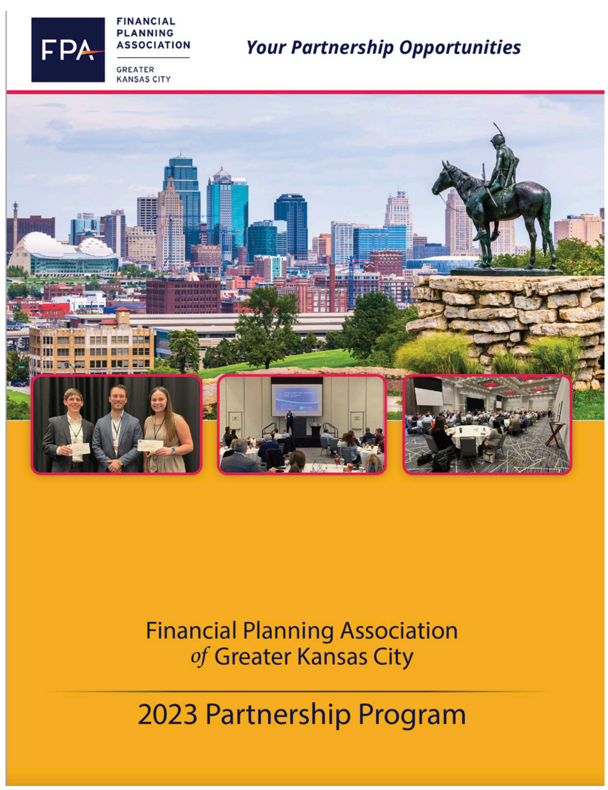
WELCOME NEW MEMBERS

Jana Ault-Phillips, CFP®
Grant Halls, CFP®
Echo Downing
Wednesday Adaams

Eric Blattner, CFA, CFP®, CIMA
Art Kennedy
Kyle Wheeler-Brown, CFP®
James Taylor, CFP®

2023 CHAPTER PARTNERSHIPS NOW AVAILABLE



ADVOCACY: TITLE PROTECTION

Insurance agents, financial planners, and stockbrokers are three very different jobs, but can all call themselves financial advisors. If someone wants to set themselves apart as someone who does comprehensive financial planning as their primary function and wants to hold themselves to a higher set of standards, there should be a way to do that. There should also be a set of standards for this profession that these professionals should adhere to that the public understands. Although there are designations and certifications that one can earn to signal that they are a financial planner, there is no legal protection for the title of Financial Planner.

Right now, the FPA is in the beginning phases of outlining what title protection looks like and whether it will be pursued at a state or federal level. There have been town hall meetings with lively debates about what the standards would be, how should the title be protected, and where this protection would differ from other certification or designations like the CFP®

Nick Gertsema, CFP®, ChFC®, RICP®, AIF®
FPAGKC 2023 Director of Advocacy

Participate in an Upcoming FPA Member Town Hall on Title Protection

As you know, FPA announced an ambitious goal in July to secure the legal recognition of the term “financial planner” through title protection. This is FPA’s long-term advocacy objective, which we believe will protect consumers and advance the financial planning profession.

The Association will be working to identify the threshold standards for competency and ethics that anyone proclaiming to be a financial planner should meet to merit the use of the title. As an FPA Member, your thoughts and opinions are important in this process.

FPA leaders will hold a series of FPA Member virtual town halls through the first quarter of 2023. These are just a few of the planned opportunities to share your questions and ideas that will help shape the potential threshold standards and strategies the Association may employ to pursue this lofty goal.

We currently have three one-hour virtual town halls scheduled for January 10, February 21, and March 9, and we encourage you to register for one – or all – of these interactive discussions. Financial planning is your profession, so please consider joining us so we can hear your thoughts on this important initiative!

[Register for a Town Hall!]

2023 BOARD OF DIRECTORS

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Carrie Ohm, CPFA
OneDigital

President
Ben Skilling, CFP®
UMB

President Elect
Jason Newcomer, CFP®
Dogwood Wealth Management

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Stepp & Rothwell, Inc.

Director of Advocacy
Nicholas Gertsema, CFP®, ChFC®, RICP®
Gertsema Wealth Advisors

Director of Communications
Conor Kelly, CFP®
The EFT Store, Inc.

Director of Community Outreach
Chris Lilley
The Insurance Partners

Director of Membership
Tylor Willis, CFP®
UMB

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
Andrew Zumwalt, CFP®
University of Missouri

Directors at Large

Jennifer Price, CFP®
Creative Planning, Inc.

Thomas Kaminski, CFP®
Benchmark Capital Group

Jennifer Malone, CFP®, CMFC
BMG Advisors

Eric Martinez, CFP®, MBA, CRPC®
American Century

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 an interactive masterclass program with focus the essential skillset for today's modern advisor: ***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.

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

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.

Preview from Amy...

REGISTER TODAY!

Greater Kansas City FPA Golf Tournament

May 1, 2023 | 10:00 am Shotgun Start

Canyon Farms Golf Club

It's been a minute, but it's finally back and bigger than ever! The FPA Golf tournament will be returning Monday, May 1, 2023, at Canyon Farms Golf Club in Lenexa, KS. Grab your clients, prospects and colleagues and come compete for a chance to be crowned the FPA Golf Champions! Food, drink, prizes, and a whole lot of fun await. Click Here to Register. Don't wait as this event will sell out quickly!

Golf Team Registration…$750

Covers golf, lunch, drink tickets and reception for the team (foursome)

Sponsorships Opportunities

- **Golf Hole Sponsor…$300** (included with Platinum Partnerships)
- **Beverage Cart Sponsor…$500** SOLD
- **Lunch Sponsor…$750**
  Opportunity to include company information, business cards or other logo items in every box lunch.
- **Reception Sponsor…$750**
  Opportunity to be recognized as the sponsor of the post golf reception where we will gather to have more food and drink and hand out prizes.
- **Swag Bag Sponsor**
  We are looking for donation items for each golfer swag bag (golf balls, tees, ball markers, golf towels, coupons, etc.). If interested, please contact brandy@fpakc.org.
- **Raffle Sponsor**
  We are looking for high value donation items to be raffled (examples: golf clubs, range finders, shop credit, sports memorabilia, gift cards, event tickets, etc.). If interested, please contact brandy@fpakc.org.

FINANCIAL PLANNING ASSOCIATION

Take 5

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

January 2023

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!

Participate in an Upcoming FPA Member Town Hall on Title Protection

The legal recognition of the term "financial planner" through title protection is FPA's long-term advocacy objective. We will be working over the next couple of years to define our strategies and identify the threshold standards for competency and ethics that anyone proclaiming to be a financial planner should meet. As an FPA Member, we need you to share your thoughts and opinions. FPA leaders will hold a series of virtual town halls with FPA Members so you can share your questions and ideas that will help shape the potential threshold standards and strategies the Association may employ in pursuit of this lofty goal. Register for a town hall now!

The January *Journal of Financial Planning* Now Available

FPA members can now read the January issue of the *Journal of Financial Planning* for a deep dive into behavioral finance. Learn how to untangle behavioral finance and the psychology of financial planning, explore the leadership qualities that drive engagement, availability bias, strategies for team resilience, behavioral marketing, recent Social Security reform proposals, and much more. Access the latest issue of the *Journal* now.

The *Journal of Financial Planning: Best of 2022* Special Issue Is Now Available

As an FPA Member, we thank you for being a part of our community. Your contributions make us who we are, and your ongoing membership matters. As a gesture of our sincere appreciation, we're delighted to share the *Journal of Financial Planning: Best of 2022*, a special bonus issue highlighting the best content throughout the year. This special edition of the *Journal* showcases the best content from 2022 and is available only to FPA Members. Access the special edition now.

Take 5

Introducing the FPA Business Hub

Explore thought leadership content and solutions from experts and vendors across financial services with the new FPA Business Hub. Access this curated online library of timely and downloadable content on more than 10 critical topics. With a mix of technical, management, and professional development content, the Hub is designed to meet your needs. The Hub already features 40+ downloadable pieces of content and more will be added regularly. Access the FPA Business Hub today!

FPA Open Enrollment is February 1 – 28

FPA members may enroll in **Business Overhead Expense Insurance** (simplified underwriting on the first $6,000 of elected coverage with one health question), **Group Short-Term and Long-Term Disability Insurance** (guaranteed Issue with no medical questions if not previously declined), and/or **Group Term Life and AD&D Insurance** (simplified underwriting on the first $50,000 of elected coverage with one health question if not previously declined). To learn more, register for one of the informational webinars on February 8 at 3 p.m. EST or February 22 at 3 p.m. EST, or visit www.associationinsurancebenefits.com.

Participate in the Annual T3/Inside Information Software Survey

The annual T3/Inside Information Software Survey has gone live. It's your opportunity to rate the software programs and solutions in your tech stack and provide data for a report that offers user ratings and market share information in different categories. Many advisory firms use the report as a buyer's guide as they consider additions to their office technology. The survey is open from now until early February and it only takes 15-minutes to complete. Take the survey now!

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.

CHAPTER PARTNERS

PLATIINUM PARTNERS

AE WEALTH MANAGEMENT

American Century Investments®

GOLD PARTNERS

Allianz

Greater Kansas City Community Foundation℠

SILVER PARTNERS

ASH BROKERAGE

FlexShares® EXCHANGE TRADED FUNDS

NORTHERN FUNDS®

MANAGED BY NORTHERN TRUST

CALENDAR OF EVENTS

February 2, 2023
NexGen Happy Hour
Harpos, Westport

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