

The Newsletter of FPA of Greater Kansas City

News & Views

January 2024



**FINANCIAL
PLANNING
ASSOCIATION**

**GREATER
KANSAS CITY**

IN THIS ISSUE:

Message from the 2024 President	3
FPA Take 5	4
FPA Take 5	5
Chapter Partners	7
2024 Board of Directors	8
Calendar of Events	9

CAREER LISTINGS

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

WELCOME NEW MEMBERS

Scott Keegan, CFP®
Han Na Lim, CFP®
Lacey Luinstra
Joseph McAuliffe, CFP®
Benjamin Sight, CFP®
Kiersten Wynn

FPA of Greater Kansas City

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Message From The 2024 President

Happy New Year! I have the honor of serving as your chapter President for 2024. My name is Jason Newcomer, and I cofounded a financial planning practice a few years ago after getting started in our industry back in 2010. I have been a member of the FPA since 2016, and over the last 8 years, I've gotten a lot out of my membership. Whether it was attending a chapter meeting where I've learned about practice management, talking shop over a coffee with other like-minded professionals, or getting involved with one of several committees the FPA has to offer, not once have I questioned the value of my membership in our chapter. As such, in 2024, I have made it a personal mission of mine to advocate for our chapter. In addition, I believe the biggest theme of the board of directors this year is to return as much value to the members of our chapter as we are able to. I've semi-seriously been referring to this as membership alpha.

One of the areas garnering a lot of buzz in our chapter is our NexGen committee, headed up in 2024 by Tanner Garrett. Tanner is taking the reigns from Landon Warmund, and over the last few years, NexGen has evolved into a gathering space for a growing number of new entrants to our profession as well as career-changers who share an enthusiasm for our craft. NexGen has a lot on deck for this year, from social events to our very own mini-Gathering conference. If this sounds like a good group for you or someone you know, make sure to get acquainted with Tanner and his committee.

We've also got an incredible lineup of speakers this year, both for our chapter meetings and our Fourth Annual Symposium. If you're interested in hearing about the latest financial planning strategies you can

implement in your practice, learning about practice management to take your business to the next level, or hearing from some of the largest names in our industry share their unfiltered thoughts, there's sure to be a lot of value derived from attending meetings this year.

If you are wanting to explore the many social aspects of your membership, 2024 will present numerous opportunities for you to network with other chapter members. Whether it's over drinks at a happy hour or on the links at our golf tournament, you'll make connections and share ideas with other professionals in the Kansas City-area.

And of course, none of this would be possible without the support of our wonderful sponsors, as well as you, the members of our amazing chapter. Your 2024 board of directors has been hard at work to make sure you are able to extract the maximum amount of value from your membership this year. Here's to another great year for yourselves, your businesses, and a value >0 for your membership alpha!



Jason Newcomer, CFP®

Dogwood Wealth Management

MARCH CHAPTER MEETING

March 6, 2024

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

Embassy Suites Olathe

This meeting sponsored by:



Positive & Productive Client Communication: Behavioral Finance in Action

Barbara Kay, MA, LPC, RCC, TIPC, CTP

Normal human bias is a fundamental reason for poor client decision making. This presentation will explain the psychological principles of human bias and the impact on client decisions. The presentation will teach practical and effective cognitive shifting processes to counsel the client out of bias thinking. In addition, attendees will learn how to guide clients to productive decision making with cognitive communication processes.

Retire Well: 4 Ways To Help Clients Plan For Retirement Beyond The Numbers

Jessi Chadd, CFP®, CeFT



We know that one of the top reasons people hire a financial planner is to answer the question: Am I on track for retirement? And we know the answer to this question is not just about the money. Retirement is not simply putting a date on the calendar and moving from what was to what will be. Retirement is an opportunity to rest, reinvent, reengage, reignite, reassess, and refine. For clients to get the most out of this transition, they need a plan beyond saving money and funding expenses in retirement. What does it look like for advisors to help their clients retire well? In this presentation, we will define retirement as a wholistic life approach that goes beyond the traditional considerations of income planning, Social Security strategies, and RMD tax planning. A life center retirement plan that includes financial capital, human capital, health capital, a plan for engagement, defining life, and focusing on legacy.

Registration Fees:

Members \$35

Non Members \$99

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

REGISTER TODAY!



FINANCIAL
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Take 5

An update on the programs and services that make FPA *your partner in planning*[™]



January 2024



Kick Off Your New Year with Early Bird Registration for FPA Retreat 2024!

Join us for FPA Retreat 2024 from May 6-9 at the picturesque Loews Ventana Canyon Resort in Tucson, Arizona. You'll participate in an extraordinary journey that will inspire fresh perspectives and challenge conventional norms. If you're excited about being part of an inventive and future-focused community, then FPA Retreat 2024 is just for you. Register by January 29 to take advantage of special early bird pricing—the lowest possible registration rate you'll find! [Register now!](#)

Read the CEO Quarterly Update to Learn About FPA's Activities in Q4 of 2023

To keep FPA Members and volunteer leaders apprised of what the Association is doing to support members and elevate the profession, FPA CEO Patrick D. Mahoney provided a quarterly CEO Update for Q4 of 2023. In the latest Update, Patrick celebrates the 50th anniversary of the CFP® certification, and highlights some of the newer programs, initiatives, and member benefits. [Read the CEO Update now.](#)

The January Journal of Financial Planning Now Available

FPA Members can now read the January 2024 issue of the *Journal of Financial Planning* to learn about increasing client savings rates, growing their business through client segmentation, cryptocurrency, mentorship for the next generation of financial planners, the intersection of fintech and behavioral finance, the role of self-disclosure, factor exposure, and much more. Access the latest issue of the [Journal now.](#)

Empowering You and Your Business in the New Year

As we embark on a fresh year, filled with opportunities and growth, imagine having a dedicated source for cutting-edge information on practice management, business transitions, tax planning, and well-being. Look no further, as the FPA Business Hub is here to provide just that. Our hub offers the latest thought leadership, including white papers, research reports, case studies, and more, ensuring you stay ahead with insights from reputable authorities. Bookmark the FPA Business Hub and explore the wealth of knowledge available to you. Start the year right by visiting www.fpahub.org!



Unlock Exclusive Savings with the FPA Marketplace

Experience unparalleled savings as a valued FPA member with the FPA Marketplace, powered by the Chalice Network®. Delve into a wealth of benefits tailored to you—professionally and personally. You'll find everything you need, including various insurance programs, savings on fintech, and more. You also have access to BenefitHub, where you can tap into potential savings totaling thousands of dollars across an extensive array of services and programs. Benefit from top-notch offerings from Verizon, Costco, Geico, Avis, Hertz, Disney, AMC, Gap, and more. [Access the FPA Marketplace now!](#)

FPA Members Get Complimentary Access to TIFIN Wealth

We were excited to announce a new partnership recently with TIFIN Wealth to support the growth of independent financial planners by providing access to TIFIN's personalized investment platform at no cost for FPA members who manage under \$100M in AUM. This member benefit aims to empower FPA Members with cutting-edge tools and resources to better serve their clients while making investment technology more accessible. [Learn more now!](#)

Now Available: FPA-Branded Apparel

Elevate your fashion game with the latest and greatest in FPA-branded apparel! The FPA Merchandise Store offers a range of FPA-themed gifts and accessories that are sure to impress. From stylish clothing to premium notebooks and bags, the FPA Merchandise Store is just a click away. Our online platform ensures a seamless shopping experience, allowing you to browse and purchase your favorite items from the comfort of your home or office. Check out all that's available in the [FPA Merchandise Store!](#)

FPA Wins Two LUMINARIES Awards from ThinkAdvisor

Each year, *ThinkAdvisor* recognizes outstanding organizations and individuals in the financial services industry with their annual LUMINARIES Awards program. FPA was honored to win two awards this year in the areas of Community Impact and Thought Leadership/Education. This recognition is a tremendous honor and is due to the hard work and dedication of FPA Members, chapters, volunteer leaders, and professional staff. [Learn more about the LUMINARIES Award.](#)



**Support the Advancement
of Your Profession**

The [FPA Political Action Committee \(FPA PAC\)](#), the only PAC focused on advancing the financial planning profession, provides an important seat at the table, forges relationships with lawmakers and their staffs, and provides an opportunity to share the financial planning story. There is much work to do and every dollar counts. To help us fight for your profession, we ask you to make a contribution to support your FPA PAC. Whether you contribute \$50 or \$5,000, every dollar is appreciated and will support advocacy efforts that move your profession forward.



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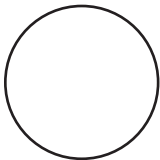
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BMG Advisors

Jennifer Price, CFP®
Creative Planning, Inc.



Jacob Watts, CFP®
Legacy Financial Strategies

CALENDAR OF EVENTS

February 1, 2024
NexGen Happy Hour
The Bar, Prairie Village

March 6, 2024
Chapter Meeting
Embassy Suites, Olathe

May 3, 2024
NexGen Mini Gathering
American Century
Kansas City, MO

May 6, 2024
Golf Tournament
Canyon Farms, Lenexa

June 19, 2024
Chapter Meeting
Embassy Suites, Olathe

August 21, 2024
Symposium
Embassy Suites, Olathe

October 17, 2024
Chapter Meeting
Embassy Suites, Olathe

November 20, 2024
Ethics Meeting
VIRTUAL

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

