The Newsletter of FPA of Greater Kansas City

News&Views

September 2022

FPA FINANCIAL PLANNING ASSOCIATION

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FPA of Greater Kansas City

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WELCOME NEW MEMBERS

Lindsay Adams, CFP®
Richard Armstrong, III, CFP®
Blake Arnold
Joseph Atkisson, CFP®
Carah Berry, CFP®
Cody Blevins, CFP®
Kori Cheatham, CFP®
Jake Cross, CFP®
Ashley Dickson, CFP®
Shelley Finnestad, CFP®
Brent Forck, CFP®
Paige Fowler, CFP®
John Gascon, CFP®
Susan Geiersbach, CFP®
Adam Gentry, CFP®
Claudia Gray
Stephanie Green, CFP®
Matthew Heitmann, CFP®
Sydney Hofstetter, CFP®
Tyler Jessup, CFP®
Jennafer Johnson, CFP®
Braiden Jolliff
Patrick Keefer
Nick Kendall, CFP®
Grant Minick, CFP®
Annie Myers
Marie Osterhaus
Jarrett Paoni, CFP®
Jonathan Perrin, CFP®
Seth Petsch, CFP®
John Rubin, CFP®
Matthew Shull, CFP®
Joseph Tonkovic, CFP®
Kelly Uran, CFP®
Tylor Willis, CFP®

SYMPOSIUM 2022

The Chapter held its second annual Symposium on August 21 in Olathe with over 220 attendees, students, speakers, sponsors and exhibitors in attendance! Highlights of the day included Keynote Speaker Michael Kitces, 12 breakout session, a Super CE session, and a lot of time for networking. If you have any interest in joining the Programs Committee to assist with planning the 2023 event please email brandy@fpakc.org.

Mark your calendar and join us for the Third Annual Symposium August 30, 2023!

ANNETTE WELLS MEMORIAL SCHOLARSHIPS AWARDED

Each year the Greater Kansas City Chapter awards the Annette Wells Memorial Scholarship to deserving CFP® candidates. The scholarship is in honor of Annette Wells, a former FPAGKC President who passed away from cancer.

Halle Christensen and Trevor Martin, both enrolled in the Personal Financial Planning program at Kansas State University, were awarded Annette Wells Memorial Scholarships at the FPA of Greater Kansas City Symposium on August 31. Congratulations Trevor and Halle!

SYMPOSIUM SPONSORS AND EXHIBITORS

Thank you Sponsors

Thank you Exhibitors

AXOS Advisors
BlueRock
Community Lenders of America
First Trust Advisors, L.P.
FP Transitions
Mariner Platform Solutions
NEXA Insights
Northern Trust
Symphonic Financial Advisors

2022 BOARD OF DIRECTORS

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Tyler Landes, CFP®, AIF®
Tandem Financial Guidance, LLC

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UMB

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Reliant Financial Services

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Legacy Financial Strategies

Director of Programs
William Bohne, CFP®
Embark Financial

Directors of Public Awareness

Jack Giardino, CFP®
Mariner Wealth Advisors

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

OCTOBER CHAPTER MEETING

October 19, 2022

2:15 - 5:00 pm

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

This meeting sponsored by:

Mastering The Human Side of Advice

Brendan Frazier
Founder
Wired Planning

Every financial advisor knows that oftentimes the biggest barrier for clients to overcome on their path to financial success has more to do with their brain than their budget. More to do with mindset than money. Behavioral finance research has done a great job teaching us why clients don't always act rationally despite knowing what they're supposed to do. But the key is knowing what to do about it. It's time to learn the behavioral and psychological principles you can apply in your practice to enhance client outcomes and forever change the trajectory of your business.

FAFSA Changes that WILL Impact Your Clients

Cozy Wittman
Education and Partnerships
College Inside Track

Unbeknownst to most, the COVID relief bill passed at the end of 2020 included some significant changes to the FAFSA. These changes will likely be a huge disruption in the college planning landscape that will require new strategies for your clients. There are distinct winners and losers with the new legislation. These changes sit on top of the massive changes to the college process in the last 2 years, including how colleges award scholarships, ACT testing cancellations and rules for how/when colleges can offer deals to families. This presentation will educate advisors around the impact the changing landscape will have on their clients and provide opportunities to be able to work with multiple generations!

Registration Fees:
Members $29 Non Members $99
Continuing Education: CFP® 2 hours approved Kansas Insurance 2 hours approved

Additional information and registration!

ETHICS VIRTUAL CHAPTER MEETING

November 16, 2022

11:00 - 1:15 pm

VIRTUAL

This meeting sponsored by:

Allianz

Community Lending of America Inc.

The Updated CFP® Board of Standards New Ethics Course

Melissa Kemp, CFP®, AEP®, CAP®, CNAP®

This program fulfills the requirements for CFP® Board approved Ethics CE. The program is designed to educate CFP® professionals on the CFP® Board's new Code of Ethics and Standards of Conduct, which became effective October 1, 2019 and has been updated in 2020, for rollout to CFP® professionals as of April 1, 2021.

Melissa Kemp, CFP®, AEP®, CAP®, CNAP® currently serves as the contract Executive Director for the Financial Planning Association of Greater Phoenix. Prior to accepting the Executive Director role in 2015, Melissa had been a chapter member since 2000.

Melissa is the founder and owner of Premium Organization, an Association Management Company, launched in 2000. Premium Organization provides administrative solutions for many nonprofit organizations, including 501(C)(3), (C)(4), and (C)(6) type entities. Melissa knows how to deliver quality programming under a nonprofit umbrella.

She also owns Premium Administration, LLC, a third-party administrator for trustees of Irrevocable Trusts. As a trust administrator of complex estate planning documents with high dollar values, she understands the rigor and exactitude required of financial planning professionals and the critical value of a highly regarded reputation.
In 2021, Melissa is serving as a Hearing Panel Volunteer by the CFP® Board of Standards Disciplinary and Ethics Commission. The Hearing Panel is responsible for overseeing and processing 2021 disciplinary actions.

Registration Fees:
Members $29
Non Members $99
Continuing Education: CFP® 2 hours approved Kansas Insurance 2 hours approved

REGISTER TODAY!

Take 5

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

September 2022

Exciting Keynote Speakers Announced for FPA Annual Conference 2022

FPA is pleased to announce the exciting slate of keynote speakers for FPA Annual Conference 2022 in Seattle from December 12-14. Sallie Krawcheck, Keith Ferrazzi, and Traci Brown, CSP, will headline the event that is recognized as the largest gathering of CFP® professionals each year.

Sallie Krawcheck, CEO and co-founder of Ellevest, is one of the few executives to find success in large complex companies and as a startup CEO and is widely recognized as one of the most influential women in business.

Keith Ferrazzi has led profound transformations throughout his career, including as Chief Marketing Officer of Deloitte and Starwood Hotels. He is author of several New York Times best selling books, including *Never Eat Alone*.

Traci Brown, one of the world's foremost body language authorities, has been trained in the body language of deception detection. She now uses her training to teach the lie, fraud, and identity theft detection skills she's used to uncover the truth in billion-dollar business deals, crimes, and politics.

Register to join us in Seattle for a memorable event!

Partnership Makes Behavioral Finance Experts More Accessible to FPA Chapters and Members

FPA and the Financial Behavior Keynote Group have partnered to support FPA chapters and the educational programs they host for FPA Members. The partnership helps chapters secure recognized and respected behavioral finance experts to speak at local educational events at significantly discounted pricing. FPA chapters can now secure Kristy L. Archuleta, Ph.D., LMFT, CFT-I™; Mary Bell Carlson, Ph.D., CFP®, AFC®; Ryan H. Law, CFP®, AFC®; and Michael G. Thomas, Jr., Ph.D., AFC®, with a 20% discount on in-person and virtual events. Chapters with fewer than 400 members can secure an additional 20% discount. Learn more.

Take 5

The FPA Policy Center Connects You to the Issues that Matter

FPA wants to partner with you to be a voice for the financial planning community on Capitol Hill, in state legislatures, and with regulatory and certifying bodies. FPA works to ensure that the issues that matter to you most are incorporated into the rules and regulations that shape the trajectory of the profession. The FPA Policy Center provides you clarity about the issues we are tracking, positions on potential policies and regulations, tools and programs you can use to get engaged in the process, and much more. Learn more about the issues that matter.

College Planning Certificate Now Available to Financial Planners

With over 44 million student loan borrowers and outstanding education debt exceeding $1.7 trillion, financial planners can play a pivotal role in helping families plan and pay for college. To help you serve the needs of clients with college-bound children, FPA has partnered with College Aid Pro™ to launch ***College Planning Made Easy: An FPA Certificate Program***. The course, which qualifies for 4.5 CFP® CE credits, provides a deep dive into not only the technical aspects of navigating the college funding maze, but also practical talk tracks and exercises to help planners connect with their clients and guide them through the behavioral and emotional aspects of the college buying decision. Learn more.

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

FPA members can now read the September issue of the *Journal of Financial Planning* to dig into regulatory risk, how to remotivate employees to get back into growth mode, how emotional intelligence can deepen client relationships, the role of personal financial salience, the power of using illustrations to educate, implications of SECURE Act 2.0 on retirement decumulation, and much more. Access the latest issue of the *Journal* now.

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

SILVER PARTNERS

BRONZE PARTNERS

BlueRock Capital Markets

CALENDAR OF EVENTS

October 6, 2022
NexGen Happy Hour
TopGolf, Overland Park

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

CAREER LISTINGS

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.