

The Newsletter of FPA of Greater Kansas City

News & Views

February 2024



**FINANCIAL
PLANNING
ASSOCIATION**

**GREATER
KANSAS CITY**

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CAREER LISTINGS

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

WELCOME NEW MEMBERS

Anna Foreman
Adrian Gomez
Tyler Jouret
Tim Khounvongsa
Rachel Nguyen
Morgan Ticum
Mari Venancio

FPA of Greater Kansas City

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Topeka, Kansas 66604
(303) 867-7181
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www.fpakc.org

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!



Greater Kansas City FPA Golf Tournament

May 6, 2024 | 10:00 am Shotgun Start
Canyon Farms Golf Club

The FPA Golf tournament will be returning Monday, May 6, 2024, 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**
- **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*[™]



February 2024



Hurry! Advance Registration Deadline for FPA Retreat 2024 Ends February 26!

Be part of [FPA Retreat 2024](#) from May 6–9 at the stunning Loews Ventana Canyon Resort in Tucson, Arizona. FPA Retreat is an immersive event that pushes your boundaries and sparks your thinking. If you crave a community that's always looking ahead, FPA Retreat 2024 is THE event for you. But act fast by registering by February 26 to attend with discounted advance pricing. This is your opportunity to lock in the best registration rate to join us in Tucson!

[Register now!](#)

FREE WEBINAR! Ed Slott's Top 2024 Tax-Season Conversations for Your Clients' Retirement Savings

Position yourself as a proactive financial planner with insights from America's IRA Expert, Ed Slott, CPA. Join us on March 7 at 2:00 p.m. ET for a free webinar with Ed Slott when he shares how you can navigate larger 2024 Required Minimum Distributions and tackle the #1 RMD mistake. You'll learn how to seize limited-time tax opportunities for high-income clients and explore new charitable planning strategies, including the TRIPLE WIN solution. Act now to set yourself apart in retirement planning with actionable insights from the foremost authority, Ed Slott. [This special webinar is free for all, so register now!](#)

The February *Journal of Financial Planning* Now Available

FPA Members can now read the February 2024 issue of the *Journal of Financial Planning* to learn about soft skills for the augmented adviser, the skills of women in wealth management, artificial intelligence and client health, the risks of delaying Social Security, consumer attitudes on long-term care, and much more. Access the latest issue of the [Journal now.](#)

FPA Open Enrollment Is February 1 – 29

FPA members may enroll in a wide range of insurance programs through our friends at Ryan Insurance Strategy Consultants, including Business Overhead Expense Insurance, Group Short-Term and Long-Term Disability Insurance, and/or Group Term Life and AD&D Insurance. To learn more, visit associationinsurancebenefits.com.



FPA PAC Shares End-of-Year Report for 2023

The FPA Political Action Committee (FPA PAC) is pleased to share a glimpse into its work over the past year, made possible by the unwavering support of FPA Members nationwide. In the FPA PAC 2023 Year-End Report, you'll learn about FPA PAC's focus, how it supports the financial planning profession, a new policy on PAC contributions to political campaigns, key metrics that matter, and more. You'll also learn about FPA PAC's top contributors and how you can help advance FPA PAC's mission in the year ahead. [Access the report.](#)

Become a Media Maestro with Media Mastery 2.0

Step confidently into the media spotlight with FPA's new on-demand Media Mastery 2.0. Created in collaboration with AdvisorPR and exclusively hosted on the FPA Learning Center, this comprehensive program empowers you with the skills to master media engagement. Explore PR essentials, craft compelling media materials, and learn the art of successful interviews. Accessible anytime, anywhere, the first module is free for FPA members, and Modules 1-4 are available to FPA members for \$99 and nonmembers for \$199. Elevate your media presence and start making a lasting impact today! [Dive In!](#)

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!](#)



**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.



CHAPTER PARTNERS

PLATIINUM PARTNERS



American Century
Investments®



GOLD PARTNERS



SILVER PARTNERS



2024 BOARD OF DIRECTORS



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UMB



President
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Dogwood Wealth Management



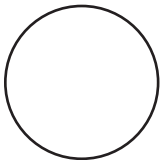
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Jack Giardino, CFP®
Inflection Point Wealth Advice



Secretary/Treasurer
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Stepp & Rothwell, Inc.



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Eric Martinez, CFP®, MBA, CRPC®
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Director of Programs
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Embark Financial



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Thomas Kaminski, CFP®
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Chris Lilley
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Jennifer Malone,
CFP®, CMFC
BMG Advisors

Jennifer Price, CFP®
Creative Planning, Inc.



Jacob Watts, CFP®
Legacy Financial Strategies

CALENDAR OF EVENTS

March 6, 2024
Chapter Meeting
Embassy Suites, Olathe

March 7, 2024
NexGen Happy Hour
Char Bar, Westport

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>

