The Newsletter of FPA of Greater Kansas City

News&Views

March 2022

FPA

FINANCIAL PLANNING ASSOCIATION

GREATER KANSAS CITY

IN THIS ISSUE:

LOOKING FOR A WAY TO GET INVOLVED?

We are currently looking for someone to help with programs and events, specifically the Women's Network. Please email brandy@fpakc.org for more information.

FPA of Greater Kansas City

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BJohnson@OneFPA.org
www.fpakc.org

CAREER LISTINGS

Visit the FPA of Greater Kansas City Careers Page for a full list of available positions.

UPDATE FROM YOUR PUBLIC RELATIONS COMMITTEE

by Nolan Keim, CFP®

Spring is here… Finally! We are creeping ever so quickly towards warmer days and busy schedules. I challenge everyone to make the most of that time with family and friends.

As a co-chair of the Public Relations committee for the FPA of Greater Kansas City, I wanted to take some time to outline what we have been up to and several ways for you to get involved.

KANSAS CITY STAR

The FPA of Greater Kansas City offers many ways for you to market yourself. One of the ways the Public Relations committee promotes this is through our partnership with the *Kansas City Star*. Bi-monthly, the *Kansas City Star* features articles written by members of the FPA. These articles are roughly 500-1,000-word articles on topics of the author’s choice.

This is a great opportunity for multiple reasons.

1. It provides the Kansas City community with tools that could benefit them financially or even personally.
2. It markets the Financial Planning Association of Kansas City to the community.
3. It allows FPA Members the opportunity to market themselves and/or their firm.

If you want to learn more about how you can get involved, please contact committee member, Kelly Arias, at kelly.arias@prosperityadvisors.com. We are always looking for writers!

KCUR RADIO EXPOSURE

For over 10 years, the Public Relations committee has had the opportunity to take part in radio segments through KCUR 89.3. Most recently, the committee members were quarterly guests on the *Up-to-Date* show hosted by Steve Kraske.

Over the years, we have had conversations with Steve and the call-in guests on many great topics.

This has allowed us to again provide a resource to the Kansas City community to learn and gain a better understanding of their financial picture.

Sadly, our time with KCUR may be coming to an end. The committee is going to remain connected with KCUR and be featured as periodic guests on the show.

WHAT IS NEXT?

As a committee, we meet monthly to brainstorm ways to broaden our outreach to support the FPA of Greater Kansas City.

We are currently considering ideas such as a FPAGKC podcast, weekly money tips videos, and more.

I have no doubt we will find ways to continue to be one of the most active committees of the FPAGKC. If you have questions regarding the Public Relations Committee, or how you can get involved, please contact myself at nolan.keim@marinerwealthadvisors.com.

If you want to learn more about FPAGKC or how you can better market yourself, please contact Brandy Johnson at brandy@fpakc.org.

Nolan Keim, CFP®
FPAGKC 2022 Public Relations Committee Co-Chair

2022 BOARD OF DIRECTORS

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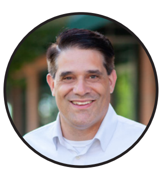

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FPA of Greater Kansas City

FPA FINANCIAL PLANNING ASSOCIATION

Take 5

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

March 2022

Carson Coaching Becomes FPA's Official Coaching Partner

With an eye on helping members serve their clients, grow their firms, and leave a lasting impact, FPA is pleased to announce that Carson Coaching has become the Association's official coaching partner. Through the partnership, Carson Coaching is providing several exciting opportunities for FPA members to positively impact themselves and their businesses. Members can now access Carson's online coaching center, monthly group coaching, discounts to attend many Carson programs, and much more. Learn more about all that is now available to you as an FPA member!

Don't Wait. Register for FPA Retreat 2022 Now!

The top minds in the profession will reconvene at FPA Retreat 2022—a one-of-a-kind event designed to help you relax, be reinvigorated, and challenge your way of thinking about yourself, your business, and your profession. Over four days, you will be invited to share ideas, examine critical issues, and learn how you play a pivotal role in paving the way forward for the profession. It's an opportunity to rekindle past relationships and forge new ones—all in a beautiful, intimate setting. Join us April 23-25 at the Hyatt Regency Lost Pines Resort and Spa in Lost Pines, TX, for a one-of-a-kind event. Register now!

New Member Benefit: Premium Discount on Individual Disability Insurance

As part of the suite of insurance solutions available through Ryan Insurance Strategy Consultants, FPA members can now access a 10% premium discount on premiere individual disability policies through Principal — a disability income insurance leader. This terrific new offering for FPA members includes a non-cancelable policy with fixed premiums, a true own occupation protection full benefit period, guaranteed options to increase benefits non-medically, and three separate cost of living adjustment riders. Learn more!

The March *Journal of Financial Planning* is Now Available

The *Journal of Financial Planning* has been expanding the base of professional knowledge in financial planning for 43 years. And that continues this month with the availability of the March 2022 issue. This month, the *Journal* tackles a host of important issues that are relevant to you, your business, and your clients. FPA members can access the March issue now!

FPA

Take 5

New Research Reveals How to Build Client Trust and Commitment

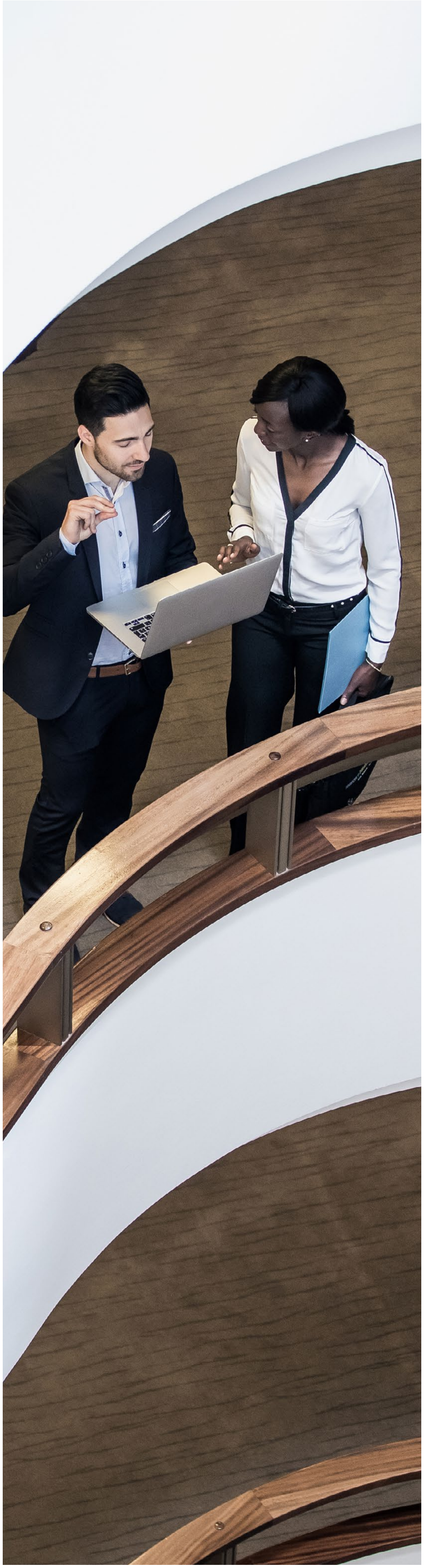
How have virtual meetings impacted engagement with financial planning clients? Are financial planners adequately addressing the anxiety clients are feeling about their financial well-being? Are financial planners meeting client expectations? These and other topics were explored in new research that is detailed in an in-depth whitepaper, ***Developing and Maintaining Client Trust and Commitment in a Rapidly Changing Environment***, with each chapter available as separate, downloadable documents. This research was supported by Allianz Life Insurance Company of North America. Access the whitepaper now!

Support the FPA Political Action Committee (FPA PAC)

As the only federally registered political action committee with a focus on financial planners, the FPA Political Action Committee (FPA PAC) is a force in elevating the profession. To impact policies and legislation that affect the profession, the FPA PAC provides the FPA and the financial planning community with a critical voice at the federal level, opening doors for important discussions, allowing us to forge relationships with federal lawmakers and to tell the financial planning story on a visible and impactful stage. Learn more and support FPA PAC today.

FPA Job Board Has Solutions to Help You Grow

FPA is making it easy for companies to find ideal candidates while supporting those looking for their next career opportunity. The FPA Job Board allows job seekers to showcase their skills and work experience to prospective employers and provides employers access to a qualified talent pool to fill open positions. In partnership with the Financial Job Exchange (FJE), the FPA Job Board aims to provide the most relevant jobs for candidates and the highest return on investment for employers. See what the FPA Job Board can do for you!



You have *fiduciary* duties

We have insight and tools to *help*

Your 401(k) clients count on you to help keep their plans in compliance. John Hancock's online collection of fiduciary resources will help you educate plan sponsors about their duties under ERISA—and establish processes for planning and compliance.

Sample our resources for retirement plan fiduciaries.

retirement.johnhancock.com/fiduciary

jhinvestments.com/dcio-resources

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

Allianz

Community Lending of America Inc.

SILVER PARTNERS

ASH BROKERAGE

AMERICAN FUNDS® From Capital Group

First Trust

FlexShares® EXCHANGE TRADED FUNDS

NORTHERN FUNDS®

MANAGED BY NORTHERN TRUST

UMB® BANK

BRONZE PARTNERS

BlueRock Capital Markets

CALENDAR OF EVENTS

April 7, 2022
5:00-6:30 p.m.
The Char Bar in Westport
NexGen Happy Hour

May 18, 2022
2:30-5:00 p.m.
Chapter Meeting
Embassy Suites, Olathe

August 31, 2022
Symposium
Embassy Suites, Olathe

September 21, 2022
11:30-2:00 p.m.
Chapter Meeting
Embassy Suites, Olathe

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

WELCOME NEW MEMBERS

Christopher T. Nelson, CFP®