

The Newsletter of FPA of Greater Kansas City

# News & Views

February 2022

**FPA**

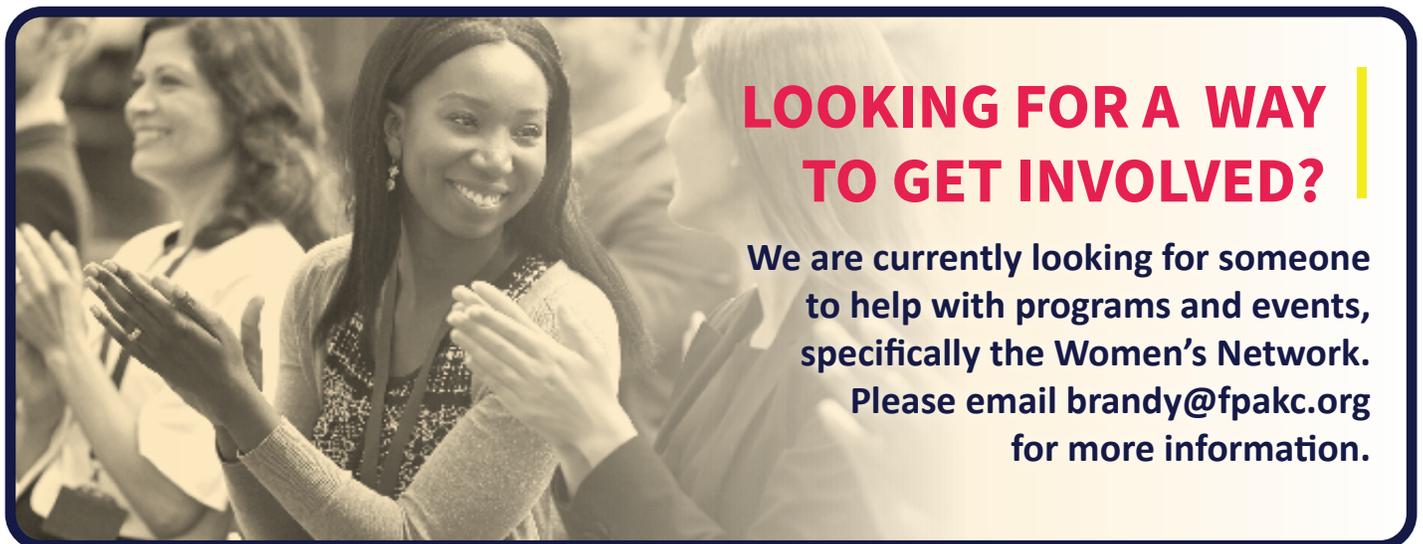
**FINANCIAL  
PLANNING  
ASSOCIATION**

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**GREATER  
KANSAS CITY**

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**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](mailto:brandy@fpakc.org) for more information.

**FPA of Greater Kansas City**  
PO Box 4303  
Topeka, Kansas 66604  
(303) 867-7181  
[BJohnson@OneFPA.org](mailto:BJohnson@OneFPA.org)  
[www.fpakc.org](http://www.fpakc.org)

**CAREER LISTINGS**

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

# MESSAGE FROM THE CHAPTER CHAIR

by Tyler Landes, CFP®, AIF®

The OneFPA Advisory Council has been around just over two years, but it represents a move forward into participatory governance for FPA at the national level. There are 80 FPA Chapters around the country, and I serve as our representative for FPA of Greater Kansas City.

I participated in my first Council meeting earlier this month and thought I would provide some updates to the Chapter.

## Free 1st Year of FPA Membership for CFP® Certificants

Newly minted CFP® Certificants will now have the opportunity to opt-in to a free 1st year of FPA membership. This will be presented during their CFP® certification process.

## Increase in Diversity, Equity, & Inclusion Representation on OneFPA Advisory Council

FPA's DE&I Committee was established in 2008, and when the OneFPA Advisory Council was created, the DE&I Committee received a representative on the Council. This month the Council voted on a measure to increase DE&I Committee representation to have three members on the Council - a measure which our Chapter supports.

## Membership On The Rise

After falling by over 3,000 members in the first year of the pandemic, national FPA membership held steady with around 18,000 members across 2021. Member retention rates have returned to normal historical levels of over 90% after dipping into the low 80s in 2020.

## Growth in New & Aspiring Financial Planners

The New & Aspiring Financial Planner membership category was added in mid-2020 and has quickly grown to around 2,000 members through efforts like FPAs virtual externship program. Our Chapter gained more than 40 members in this category in 2021 by participating in this program and supporting new planners.

In the past year, FPA has sought to reaffirm its "Core Member" as the CFP® Professional and its value proposition as the leading membership organization for those engaged in the financial planning process. As our Chapter's President, Carrie Ohm, alluded to in our December newsletter, FPA has organized its member value and benefits into four categories (PLAN).

## (P) Practice Support

This category includes the FPA Marketplace for discounts and savings on insurance, technology, marketing, and

other professional services, the Business Insights library of curated business-focused content, the FPA Job Board, and FPA PlannerSearch®.

## (L) Learning

This category includes the FPA Learning Center which houses courses for CE credit, certificate programs, and Knowledge Circles. Publications like the *Journal of Financial Planning*, *NexGen Planner*, and the popular "You're A Financial Planner...Now What" podcast. Events like the FPA Annual Conference, FPA Retreat, NexGen Gathering, FPA Residency, and the FPA Externship are here as well.

## (A) Advocacy

This category includes the FPA Policy Center where FPA engages with Federal and State policymakers to represent our profession. The FPA Pro Bono Financial Planning initiative is also housed in this category, along with FPA Media Training and Leadership opportunities.

## (N) Networking

This is where we come in! Networking efforts include local FPA Chapter events, conferences, and education. FPA Connect also hosts various online communities and discussion boards where you can find answers and share experiences with peers. Efforts to foster and grow our community like Diversity & Inclusion and NexGen are also found here.

There is a lot going on, and there is a ton of additional information, programs, and resources in each of these areas. I could probably fill a page about each one...lucky for me there's no need as FPA has already done it! You can now more easily find these member benefits and ways FPA supports our profession at the newly reorganized and streamlined [www.FinancialPlanningAssociation.org](http://www.FinancialPlanningAssociation.org).

This organization is what we make of it. As a member of the FPA of Greater Kansas City, even just by showing up to read a newsletter or attend a meeting, you're participating in making this a better community and are supporting financial planning as a process and a profession. If you're looking for a way to plug-in but aren't sure where to start, I'm happy to help.

## Tyler Landes, CFP®, AIF®

FPAGKC 2022 Chair and OneAdvisory Council Representative



# 2022 BOARD OF DIRECTORS



## **Chair of the Board**

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



## **President**

Carrie Ohm, CPFA  
Resources Investment Advisors



## **President Elect**

Ben Skilling, CFP®  
UMB



## **Secretary/Treasurer**

Todd C. Ericson, CFP®  
Stepp & Rothwell, Inc.



## **Director of Community Outreach**

Chris Lilley  
The Insurance Partners



## **Director of Membership**

Jason Newcomer, CFP®  
Barber Financial Group



## **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®  
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

# MARCH CHAPTER MEETING

**March 9, 2022**

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

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



**Dr. Chris Kuehl**

Armada Corporate Intelligence

## *2022 An Economy on the Mend?*

The last two years have been extreme - a recession in 2020 and out-of-control growth in 2021. Is 2022 the year we can start thinking of normal? The issues of last year will still be with us - inflation, labor shortages, supply chain breakdowns - but there will be new challenges such as higher interest rates, wage hikes and adjustments to the new ways business is now conducted. On top of all this will be the wild card of the pandemic - does the situation improve or do we still have new episodes to contend with.

Dr. Kuehl provides forecasts and strategic guidance for a wide variety of corporate clients around the world. He is the chief economist for several national and international organizations, such as the Fabricators and Manufacturers Association, the National Association of Credit Management, Chemical Coaters Association International and others. He is also the economic analyst for several state accounting societies including those in Missouri, Kentucky, Tennessee, North Dakota, Minnesota and Kansas.

## *Best Practices Panel: A Conversation with Fellow Chapter Members*



**Jennifer Malone, CFP®,**

**CMFC**

BMG Financial



**Marc Shaffer, CFP®**

Searcy Financial



**Mike Wren, CFP®, CDFA®**

Legacy Financial Strategies

### *Registration Fees:*

Includes two hours of CE and lunch.

Members \$29

Non Members \$99

### Continuing Education:

CFP®: 1 hour approved Kansas Insurance: 2 hours approved

**[Additional information and registration!](#)**

# Take 5

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



**February 2022**

## **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!](#)

## **As Your Partner in Planning, FPA Has the P-L-A-N for You**

FPA's web experience has been improved to make it easier for members to find what they want – when they want it. The website's navigation has been simplified and is now based on a P-L-A-N structure, which includes the verticals Practice Support, Learning, Advocacy, and Networking. The latest and most relevant member benefits are easily found on the homepage and ongoing updates will take place to ensure members can find and engage with the benefits they want. [Visit the newly updated FPA website now!](#)

## **Join Michael Kitces at FPA Retreat 2022!**

What better way to close out FPA Retreat than an interactive general session with a giant in the financial planning profession? Unplugged and unfiltered, Michael Kitces will be at FPA Retreat for an open, honest, 'ask me anything' session all attendees will enjoy. FPA Retreat will be held April 23-25 at the Hyatt Regency Lost Pines Resort and Spa in Lost Pines, TX. [Register now to be there with Michael, friends, and colleagues!](#)

## **The February 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 February 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 February issue now!](#)

### 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 35 different categories. Many advisory firms use the report as a buyer's guide as they consider additions to their office technology. FPA will send the full results out to all members, regardless of whether you've completed the survey or not. But the more people who provide their input and ratings, the more accurate the data will be. The survey is open from now until March 25 and it only takes 15 minutes to complete. [Take the survey 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.](#)

### Want to Get Media Queries in Your Inbox? Be a Part of FPA MediaSource!

Reporters from around the country are sending out media queries to CFP® professional members of FPA each day. This is a great opportunity for FPA members to engage with reporters on upcoming stories and build name recognition and awareness. Want to take part? Simply attend one of the quarterly All-Member Virtual Media Trainings planned for 2022 to take the first step in working with the media. [Check out the media training schedule and register today!](#)

## Take 5 is Brought to You by Ryan Insurance Strategy Consultants

Since 2009, FPA has partnered with Ryan Insurance Strategy Consultants to offer FPA members an industry-leading Long Term Disability plan, and recently launched a group voluntary Term Life plan. They also consult with advisory firms in making insurance product recommendations and their network of advisers are available to help solve more complicated insurance planning issues. Learn more at [associationinsurancebenefits.com](https://associationinsurancebenefits.com)



**RYAN INSURANCE**  
STRATEGY CONSULTANTS  
*"Protecting Your Financial Plans Since 1978"*

# CHAPTER PLATINUM PARTNERS



# CHAPTER PARTNERS

## GOLD PARTNERS



Community Lending  
of America Inc.

## SILVER PARTNERS



## BRONZE PARTNERS

BlueRock Capital Markets

# CALENDAR OF EVENTS

**March 2, 2022**

**7:30-8:30 a.m.**

**NexGen Virtual Roundtable**

**March 9, 2022**

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

**March Chapter Meeting**

**Embassy Suites, Olathe**

**Economic Update**

**Chris Kuehl**

**Best Practices Panel**

**Jennifer Malone, Marc Shaffer, Mike Wren**

**May 18, 2022**

**2:30-5:00 p.m.**

**May Chapter Meeting**

**Embassy Suites, Olathe**

**August 31, 2022**

**Symposium**

**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>**