The Newsletter of FPA of Greater Kansas City

News&Views

October 2023

FINANCIAL PLANNING ASSOCIATION

FPA

GREATER KANSAS CITY

October 2023

IN THIS ISSUE:

CAREER LISTINGS

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

WELCOME NEW MEMBERS

Nick Cebulko
Nation Morin
Garrett Vanderpool

FPA of Greater Kansas City

PO Box 4303
Topeka, Kansas 66604
(303) 867-7181
BJohnson@OneFPA.org
www.fpakc.org

ETHICS VIRTUAL CHAPTER MEETING

November 15, 2023

11:00 - 1:15 pm

VIRTUAL

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 $35
Non Members $99
Continuing Education: CFP® 2 hours approved Kansas Insurance 2 hours approved

REGISTER TODAY!

FINANCIAL PLANNING ASSOCIATION

Take 5

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

OCTOBER 2023

New Research: The Transformative Power of Technology on Client Relationships

Unlock the potential of financial technology and supercharge your financial planning practice with the transformative power of client portals. Discover the key findings from groundbreaking research by eMoney Advisor and FPA, revealing how Portal Power Users experience reduced financial anxiety, increased client trust, motivation, referrals, loyalty, and higher client satisfaction. Embrace the future of financial planning today and elevate your client relationships like never before. Access the report now!

Achieve Media Mastery with the New FPA Media Training Program

Step into the media spotlight with FPA's new on-demand Media Mastery 2.0. Developed with AdvisorPR and hosted exclusively on the FPA Learning Center, this program equips you with the tools to master media engagement. Explore public relations fundamentals, how to create media-facing materials, and discover interview best practices. 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. Supercharge your media presence and make an impact today! Get started!

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 innovative investment technology more accessible. Learn more now!

The October *Journal of Financial Planning* Now Available

FPA members can now read the October issue of the *Journal of Financial Planning* to learn about tax planning, making the move from practitioner to CEO, the role of AI in building rapport and trust, estate planning, leadership and the work-life balance, delivering the right messages to the right people through drip marketing, and much more. Access the latest issue of the *Journal* now.

Don't Miss Out on FPA E&O, Cyber Liability, and E&O Insurance!

Protect yourself and your business with E&O and cyber liability insurance, including social engineering coverage and bonds.. Call today and speak with a licensed benefits counselor or apply for coverage. Provided by Ryan Insurance Strategy Consultants powered by Gallagher Affinity. Get started.

Get Started with Video Marketing That Makes a Difference!

Want to start video marketing but can't seem to make the leap? You don't have to do it alone. The Idea Kit team guides you through every step of the process and does all the heavy lifting, including building you a video marketing playlist, crafting custom scripts, and sending you the gear you need. If your goal is to engage prospects and convert them to clients or nurture your existing client relationships, then Idea Kit is for you. Learn how you can get 10% of all their video services today!

FPA Board Election Results Announced

FPA announced on Sept. 27 that the Board of Directors elected Paul Brahim, CFP®, as the 2024 FPA President-elect for a one-year term. Brahim's term will begin Jan. 1, 2024, succeeding incoming 2024 FPA President Claudia Cypher Kane, CFP®. Brahim is managing director and senior vice president at Wealth Enhancement Group in Pittsburgh, Pa., and has served as an impactful leader of the FPA of Pittsburgh chapter.

Daniel Galli, CFP®, who has served on the Board for the past two years, was selected to serve as the 2024 FPA Treasurer. Next year, Galli will complete his third year of Board service and will also serve as the volunteer leader of the FPA Finance Committee.

FPA is also pleased to announce the election of three new members to its Board of Directors, including Lisa Kirchenbauer, CFP® (FPA of the National Capital Area), Celeste Revelli, CFP® (FPA of the Philadelphia/Tri-State Area) , and Timothy Todd, Ph.D. (FPA of Central Virginia).

CHAPTER PARTNERS

PLATIINUM PARTNERS

AE WEALTH MANAGEMENT

American Century Investments®

First Trust

GOLD PARTNERS

Allianz

axos® ADVISOR SERVICES

Greater Kansas City Community Foundation℠

SILVER PARTNERS

ASH BROKERAGE

Hines SECURITIES, INC.

FlexShares® EXCHANGE TRADED FUNDS

NORTHERN FUNDS®

MANAGED BY NORTHERN TRUST

2023 BOARD OF DIRECTORS

Chair of the Board
Carrie Ohm, CPFA
OneDigital

President
Ben Skilling, CFP®
UMB

President Elect
Jason Newcomer, CFP®
Dogwood Wealth Management

Secretary/Treasurer
Claudia Gray, CFP®
Stepp & Rothwell, Inc.

Director of Advocacy
Nicholas Gertsema, CFP®, ChFC®, RICP®
Gertsema Wealth Advisors

Director of Communications
Conor Kelly, CFP®
The EFT Store, Inc.

Director of Community Outreach
Chris Lilley
The Insurance Partners

Director of Membership
Tylor Willis, CFP®
UMB

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®
Inflection Point Wealth Advice

Nolan Keim
Mariner Wealth Advisors

Director of Student Mentoring and Career Development
Andrew Zumwalt, CFP®
University of Missouri

Directors at Large

Jennifer Price, CFP®
Creative Planning, Inc.

Thomas Kaminski, CFP®
Benchmark Capital Group

Jennifer Malone, CFP®, CMFC
BMG Advisors

Eric Martinez, CFP®, MBA, CRPC®
American Century

CALENDAR OF EVENTS

November 2, 2023
NexGen Happy Hour
SERV, Overland Park

November 15, 2023
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

University of Missouri Extension Seeking Volunteers

Can you help? The Kansas City Metro Tax Coalition and MU Extension are seeking volunteers for the upcoming tax season (January – April 2024). The Volunteer Income Tax Assistance (VITA) and Tax Counseling for the Elderly (TCE) programs prepare free tax returns for people who qualify. Volunteers will receive training and certification before they begin working with taxpayers. Even if you don't want to do taxes, there are many ways to serve. You can also earn continuing education credits! Send questions to kcvita@missouri.edu or register online at: https://extension.missouri.edu/counties/urban-west-region/tax-prep/.

Save the dateVolunteer orientation is Saturday, November 11, 2023 10:00am - 11:00am by Zoom. A second session will be available on 12/05 at 6:00pm. Tax law training will be 12/11 through 12/13 by Zoom.