The Newsletter of FPA of Greater Kansas City

News&Views

September 2023

FINANCIAL PLANNING ASSOCIATION

GREATER KANSAS CITY

IN THIS ISSUE:

CAREER LISTINGS

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

WELCOME NEW MEMBERS

Steve Anderson, CFP®
Andrew Billard
Sherri Bliss, CFP®
John Davis, CFP®
Emma Gustin
Dollie Halford, CFP®
Joshua Hill, CFP®
Natalie Hyde
Ashten Jackson
Alyssa Jennings, CFP®
Robert Jones, MS, MAEd, CFP®
Jacob McNiel
Emma von Weise
John Wildern

FPA of Greater Kansas City

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NexGen Gathering: Empowering Insights for Young Financial Planners

Last month I had the privilege of attending the FPA NexGen Gathering for the first time. It was an amazing experience that showcased the supportive nature of the NexGen community on a national level. This event showed me that this community, as a cohesive unit, is remarkably encouraging. I feel confident in saying that the attendees walked away from the conference with a renewed sense of purpose and confidence.

The Gathering provides us next generation of planners with a platform to make connections, and share experiences of our successes and our struggles. In the experience of young financial planners, it can be easy to convince yourself that you are the only one dealing with particular obstacles as you progress through the early stages of your career. It can be very discouraging once you've successfully convinced yourself of this falsity, as it makes the hurdles seem that much more insurmountable. But alas, the NexGen Gathering allows us to discover that many of the hurdles we face on a day-to-day basis are shared by our fellow planners across the industry. This is an incredibly empowering revelation, because it enables us to collaborate with one another and seek solutions to these challenges (or at the very least, rest assured that we aren't going through them alone).

Additionally, the Gathering provides a space for young professionals to share their accomplishments with each other and be inspired by practicing professionals, as well as academic leaders. We have the opportunity to learn directly from those who have mastered certain aspects of this industry–aspects that many of us aspire to master ourselves. For any young (or career changing) financial professionals, I would certainly recommend attending this event (even if it means stepping outside of your comfort zone), as I believe that you will learn as much about yourself as you do about the community of the next generation of financial planners.

Jordan Priddy
Planning Associate
Legacy Financial Strategies, LLC

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!

FPA PLANNING ASSOCIATION
GREATER KANSAS CITY

RSVP

WWW.FPAKC.ORG

Join us for an

EXCLUSIVE NETWORKING OPPORTUNITY

Are you maximizing your FPA benefits, have ideas to improve upon the FPA experience, or just want to have conversations with other industry professionals, please join us for a casual happy hour...food and drinks provided!

SPONSORED BY

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Sullivan's Steakhouse
4501 West 119th St, Leawood, KS 66209

OCT 5 | 3:30-6 PM

RSVP TODAY!

FPA FINANCIAL PLANNING ASSOCIATION

Take 5

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

SEPTEMBER 2023

FPA Advocating for Tomorrow's Workforce

FPA joined with more than 500 trade associations, professional societies, businesses, and employers to form the Tomorrow's Workforce Coalition, established to build support for the Freedom to Invest in Tomorrow's Workforce Act (S. 722 / H.R. 1477). This bipartisan, bicameral legislation would expand qualified expenses under 529 savings plans to include postsecondary training and credentialing, such as licenses and professional certifications. Learn more about this important advocacy effort and the role FPA is playing as part of the Tomorrow's Workforce Coalition. Read the announcement.

Stay Ahead in the Fast-Moving World of Alts With UniFi By CAIA™

A new partnership between FPA and the Chartered Alternative Investment Analyst (CAIA) Association is bringing you greater access to innovative educational resources with UniFi by CAIA™. Designed for financial professionals like you, UniFi by CAIA™ offers you discounted access to a digital-first series of educational offerings. Unlock the potential of alternative investments and expand your expertise with relevant microcredentials, including private debt and digital assets. Plus, get ready for enhancements to the FAI Certificate Program. Visit the FPA Marketplace today and seize this opportunity to elevate your financial planning capabilities and open doors to new possibilities. Learn more!

The September *Journal of Financial Planning* Now Available

FPA members can now read the September issue of the *Journal of Financial Planning* to learn about cryptocurrency compliance, time management and productivity, marketing, unclogging your prospect pipeline, the impact of caregiving on retirement plans, and more. Access the latest issue of the *Journal* now.

Delivering Thought Leadership to Help You and Your Business

From practice management and business transitions to tax planning and wellness, wouldn't it be nice to have one dedicated resource you can go to for the latest information from reputable authorities? Well, the FPA Business Hub makes that resource available to you. The FPA Business Hub is curating the latest content, including whitepapers, research reports, case studies, and more, to help you better serve your clients, teams, and business. New content is being added regularly, so bookmark the FPA Business Hub and see what the experts have to share. Visit fpahub.org to get started!

FPA

Take 5
SEPTEMBER 2023

Connect with Your Community with FPA Knowledge Circles

Like all financial planners, you have specific interests that are significant to you personally and professionally. As your partner in planning, FPA provides opportunities to drive those interests. Through FPA Knowledge Circles, you and other FPA members can coalesce around shared interests and connect globally with peers. These vibrant communities offer you an opportunity to engage in discussion, hear from experts, and build valuable connections. With 15 unique communities on planning-focused or community-based topics and issues, there is a Knowledge Circle for you. Learn more!

Unlock the Keys to Sustainable Growth for Your Practice

Are you a financial adviser struggling to grow your business? You're not alone. Recent research by FPA and Janus Henderson revealed that 46% of advisers are comfortable with their current growth rate, but only 12% strongly agree with that sentiment. The good news is the same research identified six keys to growth for today's advisory practices. The ***Six Keys to Growth for Today's Adviser*** report will help you learn about the critical factors for business growth that were uncovered in the research. Get your hands on the *Six Keys to Growth for Today's Adviser* report today and start putting your business goals within reach! Get the report!

FPA Is Your One-Stop-Shop for All Your Learning Needs

Staying razor-sharp on financial planning trends and practices makes you a competent financial planner. And while you can get a variety of education from across the financial services industry, nothing compares to the breadth and depth of education you get through the FPA Learning Center. FPA is constantly developing live and on-demand webinars, certificate programs, conference recordings, partner programs, special interest programs, and more to help our valued members stay on top of all they need to know as financial planners. There is a ton of CE to satisfy CFP® CE requirements, and many programs are complimentary – or discounted – with membership. Check out the FPA Learning Center!

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American Century

CALENDAR OF EVENTS

October 5, 2023
Member Networking Event
Sullivan›s Steakhouse, Leawood

October 27, 2023
Career Day
American Century, Kansas City

The Greater Kansas City Financial Planning Association is pleased to invite your company to participate in the Chapter Career Day. The objective of the event is to connect students with financial planning professionals in the Kansas City Metro area.

The day is structured to facilitate networking between students and area professionals. It is a great opportunity for your firm to provide information regarding internship and employment opportunities for students and career changers. We encourage your company to get involved asa way to give back to the industry by sharing your experiences with the student attendees.

Additional Details and Sponsorship Information

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