

The Newsletter of FPA of Greater Kansas City

# News & Views

January 2022



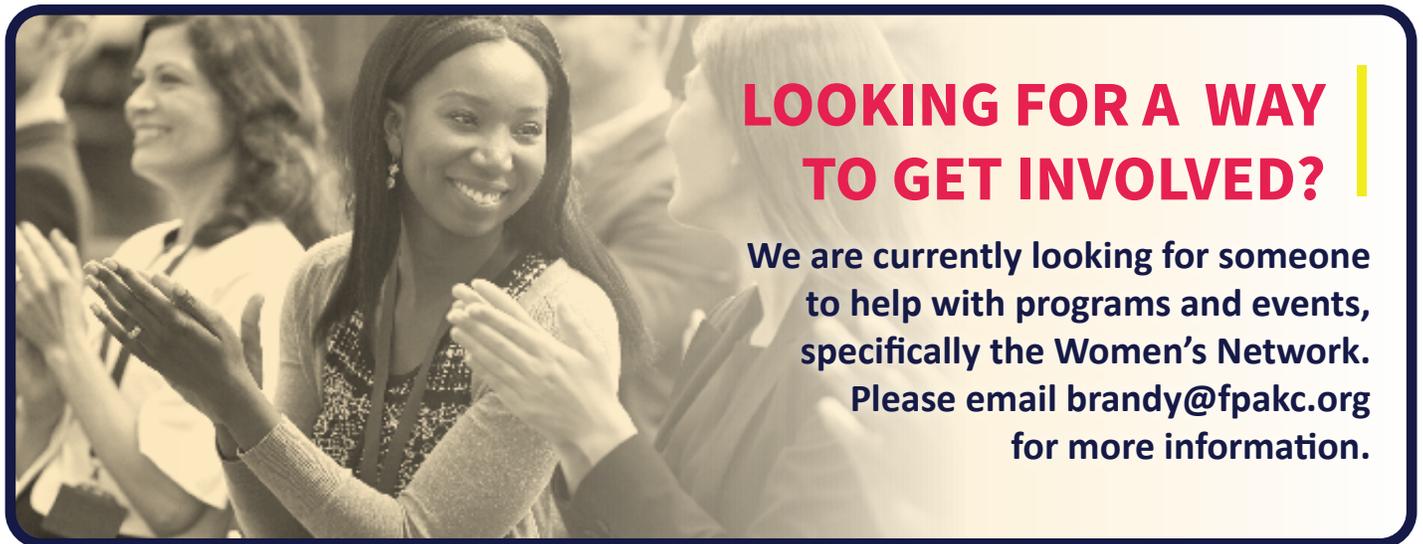
**FPA**

**FINANCIAL  
PLANNING  
ASSOCIATION**

**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**  
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(303) 867-7181  
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[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 PROGRAMS CHAIR

by William Bohne, CFP®

I love the start of a new year! Although I'm not much for resolutions, they set the perfect cadence to take stock of what's been accomplished and look forward to what's next. Looking back on 2021, our community has a lot to celebrate. As a profession, we navigated the challenges of a persistent COVID pandemic that taught us all how to engage and communicate in a hybrid environment. As an association, we sought out top industry thought leaders and brought them here to share their skills and messages. Our members were published over 20 times in the *KC Star*. We delivered our first full day Symposium. Most importantly, we advanced our client goals and gave confidence to their dreams.

2022 has already gotten off to a great start with tax thought leader Jeff Levine! Michael Kitces will be the main event at Symposium and we look forward to announcing more great speakers from inside and outside the industry over the course of the year. In addition to these big names, we will also tap into our star practitioners and share how they are addressing the same challenges we each face in our practices and client relationships. At our March meeting, we are bringing together



leaders from three local practices to share how they are evolving and structuring their practices to better their client experiences and outcomes. As I look at our membership, I see practitioners advancing our industry every day and it is my goal in 2022 to bring us closer together to share the best of what we each can offer.

The pandemic has altered how we work, and how we communicate. Before March 2021 I spent more than 240 days in the office each year. In 2022, I expect I will spend less than 24 days in an office. My example is probably more extreme than most, but it represents the reality that our work life is forever changed. How I engage with my clients, coworkers, and peers needs to evolve to match. How FPA engages with you will also evolve to match. The mediums we use to bring you content and community will be diverse. Whether you're in suit pants or comfy pants, FPAGKC will have you covered!

To close this out, I want to share with you our commitment to listen to this community. My clients taught me early on that listening is the key to delivering great value. You have great ideas to share, and big challenges that could benefit from the experience and perspective of other members. We want your to hear your voices, so please do not hesitate to speak up and get involved! Let's make 2022 our best year to date.

**William Bohne, CFP®**  
FPAGKC 2022 Programs Chair



## WELCOME NEW MEMBERS

Michael Tinio

# 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:

Two hours pending for CFP® and Kansas Insurance.

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

# Take 5

An update on the programs and services exclusively for valued FPA members



January 2022

## FPA Website Improved to Make Your Experience Better

FPA is pleased to announce that the 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!](#)

## 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!](#)

## Register Now to Attend FPA Retreat 2022!

It has been two long years since we have been able to welcome you to FPA Retreat. And after experiencing the societal trials and tribulations of the past couple of years, you owe it to yourself to reconnect with your peers in a thought-provoking experience unlike any other. The top minds in the profession will reconvene at [FPA Retreat](#) from April 25-28 at the Hyatt Regency Lost Pines Resort and Spa in Lost Pines, TX, for 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. [Register by January 31 to attend at a special early bird rate!](#)

### 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!](#)

### FPA and NARSSA Partner to Augment Financial Planner Social Security Knowledge

FPA and the National Association of Registered Social Security Analysts (NARSSA), the leader in expert Social Security education, training, and analysis fulfillment, are partnering to help educate FPA members on Social Security, including access to the RSSA course. The five-module course teaches all aspects of Social Security and trains financial professionals to expertly use leading-edge Social Security maximization software. At the completion of the course, FPA members are eligible to earn their RSSA® credential. FPA members save \$300 on course registration. [Learn more.](#)

### The January *Journal of Financial Planning* is Now Available

FPA members can now read the January issue of the *Journal of Financial Planning*, powered by Allianz, to learn about reassessing risk assessments, how to best present information to clients, the opportunities afforded by a subscription-based model, navigating estate planning with blended families, required minimum distributions as a retirement strategy, and much more. [Access the latest issue of the Journal now.](#)

## 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://www.associationinsurancebenefits.com).



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

# CHAPTER PLATINUM PARTNERS



GREATER KANSAS CITY  
COMMUNITY FOUNDATION<sup>SM</sup>



# CHAPTER PARTNERS

## GOLD PARTNERS



## SILVER PARTNERS



## BRONZE PARTNERS

BlueRock Capital Markets

# CALENDAR OF EVENTS

**March 2, 2022**

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

**NexGen Virtual Roundtable**

**March 16, 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>**